MARSHA A. GOETTING

2018

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EDUCATION

- **Doctor of Philosophy**. Department of Human Development and Family Studies, Iowa State University, Ames, May 1996. Major: *Family Resource Management*, Minor: *Gerontology*, Dissertation: *Older Adults, Bequests, and Wills.*

- **Master of Science Degree: Education**. Kansas State University, Manhattan, December 1973. Major: *Adult Education*

- **Master of Science Degree: Home Economics**. Kansas State University, Manhattan, May 1973. Major: *Family Economics*

- **Bachelor of Science Degree: Home Economics**. Kansas State University, Manhattan, December 1971. Major: *Consumer Interests*

EMPLOYMENT HISTORY

- **Professor, MSU Extension Family Economics Specialist:** (July 1992 to present); Montana State University Extension-Bozeman, Department of Agricultural Economics and Economics, Montana State University, Bozeman, MT. Responsibilities: Provide a statewide family financial education and estate planning information to Montana citizens that will enable them to improve their quality of life. Collaborate with County Extension faculty, Agricultural Economics and Economics faculty, faculty from other disciplines, and legal and tax professionals in the development and evaluation of programs in communities as well as publications available from MSU and county offices. Seek funding for needed programs.

- **Graduate Research Assistant:** (.25), (August 1992-May 1995). Department of Human Development and Family Studies; Iowa State University, Ames, Iowa. Responsibilities: Conduct literature searches, copy research articles in library, input data, conduct computer analysis of data and co-author articles.

- **Associate Professor, MSU Extension Family Economics Specialist:** Montana State University Extension-Bozeman, Department of Agricultural Economics and Economics (July 1987-June 1992).

- **Assistant Professor, State Consumer Education Specialist:** Cooperative Extension Service, Montana State University, Bozeman, MT, (April 1977-June 1987). Major Accomplishments: Developed "Estate Planning for Every Montanan," a ten-lesson study-at-home course, 26,000 participants; "Get a Grip on Your Money," a newspaper correspondence course with 2,900 enrollees offered by 39 counties; "Pickle Power," a new concept in decision making for youth with 1,100 participating; "Increasing Competencies of Limited Resource Families," federal grant and Tri-State Consortium grant; "Going Metric Without Going Mad," a nine-lesson study-at-home course with 3,100 participants; "Individual Retirement Accounts," a self-study packet containing 12 MontGuides, with 4,600 participants. Awarded grants totaling $12,000 from the State Bar of Montana for "Estate Planning for Every Montanan."

- **Assistant Professor, Area Consumer Education Specialist:** Cooperative Extension Service, Kansas State University, South Central Area Office, S. Hutchinson, KS, (March 1974-March 1977). Responsibilities: Conferred with 19 Extension Home Economists to develop Extension consumer education program. Major accomplishments: Developed food buying study-at-home course, 4,000 participants. Developed money management study-at-home course, 1,000 participants.

- **Instructor, Consumer Economics:** Kansas State Industrial Reformatory, Community College, Hutchinson, KS, (Summer 1975). Responsibility: Taught course for 40 inmates after the resignation of two instructors during the summer session.

- **Graduate Teaching Assistant:** College of Home Economics, Kansas State University, Manhattan, KS, (August 1972-May 1973). Responsibilities: Assisted with Introduction to Home Economics class. Advised 20 home economics freshmen, graded assignments, and presented lectures. Assisted with Family Finance class. Graded tests and students' budgets, operated visual equipment, presented lectures and determined grades. Taught food consumerism and personal finances classes at community colleges in Coffyville, Independence and Colby. Developed proposal for consumer education class at Colby Community College.

- **Consumer Education** (Volunteer): Illinois State Penitentiary, Menard, IL, (Summer 1971). Responsibilities: Developed a consumer education course for residents of the prison. Conferred with administrative personnel and Inmate Advisory Council in the organizational process. This was the first consumer education course to be offered at the prison. One has been available every semester since that time.

HONORS AND AWARDS

National

- *2017 Western Region Excellence in Extension Award*, Cooperative Extension, the United States Department of Agriculture (USDA), Institute of Food and Agriculture, and the National Institute of Food and Agriculture and Association of Public and Land-grant Universities, November 2017

- *Dean Don Felker Financial Management Award*, National Extension Association of Family and Consumer Sciences, 1st Place *National* Award (with Joel Schumacher and Extension Agents), September 2013

- *Epsilon Sigma Phi National Extension Honorary-Distinguished Service Award*, October 2010.

- *Continued Excellence Award*, National Extension Association of Family & Consumer Sciences, October 2009.

- *Jeanne M. Priester Award*, Montana Alzheimer Series, Goetting, M., Bailey, S., Paul, L., Vogel, M., et., al. April 2007.

- *MetLife Foundation Award*, Goetting, M., Bailey S., Paul, L., Vogel, M., et.al. Montana Alzheimer Series, Spring 2007.

- *National Family Caregiving Award*, Goetting, M., Bailey, S., Paul, L., Vogel, M., et. al. Montana Alzheimer Series, Spring 2007.

- *Florence Hall Award*, National Extension Association of Family and Consumer Sciences, along with Vogel, Bailey, Lynn, Johnson, Oelkers, Friedrich, and Roos, October 2006.

- *Educational Technology*, Third Place, National Association of Family and Consumer Science (Glenn Muske and Vukonich), 2000.

<u>Regional</u>

- *Dean Don Felker Financial Management Award*, National Extension Association of Family and Consumer Sciences, 1st Place *Western Region* Award (with Joel Schumacher and Extension Agents), September 2013

- *First Place, Western Region, Mary Wells Diversity* Award (Passing Reservation Lands), National Extension Association of Family & Consumer Sciences, September 2008.

- *First Place, Western Region, Communication-Internet Technology* Award (Dying Without a Will in Montana), National Extension Association of Family & Consumer Sciences, September 2008.

- *Dean Don Felker Financial Management* Award along with six Extension Agents, Western Region National Extension Association of Family & Consumer Sciences, Get Smart About Credit, October 2006.

- *Florence Hall Award*, National Extension Association of Family and Consumer Sciences, with Vogel, Bailey, Lynn, Johnson, Oelkers, Friedrich, and Roos, October 2006.

- *Dean Don Felker Financial Management* Award ,Western Region National Extension Association of Family & Consumer Sciences, Teach Children to Save, October 2005.

- *Educational Technology*, Southern Region, National Association of Family and Consumer Sciences, (Muske and Vukonich), 2000.

- *Regional Qualifying Program*, Western Extension Director's Awards of Excellence, Planning for Passing of Agricultural Reservation Land to Avoid Further Fractionation under the American Indian Probate Reform Act (AIPRA) of 2004.

- *Western Region Financial Management Award*, National Association of Extension Home Economists (NAEHE), (Mason), 1991.

- *Western Region Communication and Media Award*, Financial Management, (Pourroy), National Association of Extension Home Economists (NAEHE), 1990.

Iowa & Oklahoma

- Research Excellence Award, Graduate College, Iowa State University, 1996
- Website Development, Oklahoma Extension Association of Family and Consumer Sciences, 2000.

Montana

- Outstanding Member of the Year, Montana Gerontology Society, April 2017.
- Outstanding Professional Award, Montana Association of Family and Consumer Sciences, April 2016.
- Team Award, Epsilon Sigma Phi Alpha Chapter, October 2016.
- Distinguished Service Award, Epsilon Sigma Phi, 2010.
- President's Excellence in Outreach, 2006.
- Excellence in Extension, Montana Association of Family & Consumer Sciences, April 2005.
- Distinguished Service Award, Montana Family & Consumer Sciences, 2003.
- Outstanding 4-H Alumnae, Montana 4-H Foundation, 2001.
- State Team Award, Epsilon Sigma Phi, EDUFAIM, 1999.
- State Team Award, Epsilon Sigma Phi, with six Extension Agents and Specialists, 1996.
- Epsilon Sigma Phi Scholarship, Alpha Chapter, 1995.
- Montana Cooperative Extension Association Scholarship, 1995.
- Distinguished Service Award, Epsilon Sigma Phi, 1993.
- Distinguished Service Award, Montana Association of Extension Home Economists, 1993.
- State Team Award with Maatta and Muggli, Epsilon Sigma Phi, 1993.
- State Team Award with Phillips and Garoutte, Epsilon Sigma Phi, 1992.
- Communication & Media Award, Financial Management with Mason, Montana Association of Extension Home Economists, 1991.
- Communication and Media Award, Financial Management with Pourroy, Montana Association of Extension Home Economists, 1990.
- Leader Award, American Home Economics Association, Montana Home Economics Association, 1988.
- Early Career Award, Epsilon Sigma Phi, 1987.
- Extension Worker of the Year, Silver Buffalo Award, Montana Cooperative Extension Association 1985.

PUBLICATIONS

Refereed/Peer Reviewed Journal Articles

- Goetting, M, “Open a Montana Medical Care Savings Account for Tax Savings,” (Winter 2017), p. 14, Lives and Landscapes, Montana State University Extension. http://msuextension.org/magazine/assets/docs/MSUext_mag.pdf

- Goetting, M, “Who Gets Your Property When you Die,” (2014) The Standard, Association for Financial Counseling and Planning, Volume 32, page 1. www.afcpe.org

- Goetting, M., “A Living Legacy” (Fall 2014) Big Sky Small Acres, Montana State University Extension.

- Goetting, M, “Who Gets Your Property When You Die,” Montana Policy Review, (Spring 2012), p 10-13.

- DelGuerra, Claire, and Goetting, Marsha A. (January 2003). “Cremation: History, Process, and Regulations.” The Forum for Family and Consumer Issues, Volume 8 (1) pp. 1-6.

- Muske, Glenn, Goetting, Marsha A., and Vukonich, Merrylee (2001). “The World Wide Web: A Training Tool for Family Resource Management Educators.” Journal of Extension. Volume 39 (4) pp. 9-18.

- Goetting, Marsha A. (Spring 2001). "New State Laws: Opportunities for Collaboration." The Forum for Family and Consumer Issues. Volume 6 (2) pp 1-9.

- Goetting, Marsha A., and Peter Martin (Fall 2001). "Characteristics of Older Adults with Written Wills." Journal of Family and Economic Issues. Volume 22 (3) pp. 243-264.

- Goetting, Marsha A.; Martin, Peter; Johnson, Christine (2000). "Old Adults and Financial Bequests.” International Journal of Aging and Human Development. Volume 50 (3), pp 225-242.

- Goetting, Marsha A.; Raiser, Lorrie; Martin, Peter; Poon, Leonard and Johnson, Mary Ann (1996). "A Comparison of Older Women's Financial Resources and Perception of Financial Adequacy." Journal of Women and Aging. Volume 7 (4), pp 67-81.

- Goetting, Marsha A.; Martin, Peter; Poon, Leonard and Johnson, Mary Ann (1996). "The Economic Well-Being of Community Dwelling Centenarians." Journal of Aging Studies. Volume 10 (1), pp 43-55.

- Goetting, Marsha A. and Vicki Schmall. "Talking with Aging Parents about Finances." (Spring 1993). Journal of Home Economics. Volume 85, (1), pp. 42-46.

- Goetting, Marsha A. "Calculating Teens." (Summer 1992). Journal of Consumer Education. Volume 10, pp. 44-48.

- Goetting, Marsha A., and Raeann Pourroy. (Summer 1991). "Evaluation of an Interactive Newsletter Series—Getting It Together." Journal of Extension. Volume XXIX, pp. 16-19.

- Goetting, Marsha A., and Gayle Y. Muggli. (Spring 1988). "Made in Montana: Entrepreneurial Home Economics." Journal of Home Economics. Volume. 80(1), pp. 7-10.

- Wall, Ronald, and Marsha A. Goetting. (Summer 1987). "Calculating Extension Professionals Helping Folks with Finances." Extension Review. Volume 58(3), pp. 38-39.

- Goetting, Marsha A. (March/April 1984). "Pickle Power, Ad Scavenger Hunt, Consumer Sleuth, or Shopping Bag: Take Your Choice." Illinois Teacher. Volume XXVII(4): pp. 140-142.

- Goetting, Marsha A. (March/April 1982). "Pickle Power." Journal of Extension. Volume XX(2), p. 3.

- Goetting, Marsha A. (November/December 1981). "Home Study Courses: An Education Option." Journal of Extension. Volume XIX(4), pp. 14-18.

- Goetting, Marsha A. (Winter 1974). "Let's Put Consumer Education in Prison." Journal of Consumer Affairs. Volume 8(2), pp. 198-203.

Refereed Book Chapters and Other

- Book Review, "A No-Stress Guide to Becoming Financial Fit." Journal of Financial Counseling Planning, pp. 87 – 89, Volume 19 (2), 2008.

- Schumacher, J., Goetting, M., Brennan, P., "FAQs on Health Care Savings Accounts." The Standard Association for Financial Counseling Planning and Education, Volume 25, Number 4, October 2007

- Goetting, Marsha A. (Summer 1996). "Stepfamilies and the Law." Book Review, Journal of Consumer Affairs. Volume 30(1), pp 269-272.

- Goetting, Marsha A. (1993). "Marketing Accountability of Home Economics." Chapter 20, Marketing Home Economics: Issues and Practices. American Home Economics Association, Washington, D.C.

- Goetting, Marsha A. (November 1990). "Women and Home-Based Work." Book Review, Journal of Home Economics. Volume 82(4), p. 54.

- Goetting, Marsha A. (October 1983). "Evaluating an Estate Planning Study-at-Home Course." Designing Studies of Extension Program Results: A Resource for Program Leaders and Specialists, USDA, Volume II, Denver, Colorado. USDA pp. 21-22.

- Goetting, Marsha A. (Fall 1981). "Pickle Power, Ad Scavenger Hunt or Consumer Sleuth: Take Your Choice." American Council on Consumer Interests Forum XII(2): p. 6.

Refereed Conference Proceedings

- Goetting, Marsha A. (November 2011). "Building Partnerships and Utilizing Technology to Reach Employed Adults" Association for Financial Counseling and Planning Educators Conference, Jacksonville, FL.
- Goetting, Marsha A. (March 2009). "Estate Planning Interactive Site." National Extension Risk Management Education Conference, Reno, NV.
- Goetting, Marsha A. (April 2007). "Dying Without a Will in Montana." National Extension Risk Management Education Conference, Phoenix, AZ.
- Goetting, Marsha A. (April 2007). "Planning for Passing of Agricultural Reservation Land to Avoid Further Fractionation under the American Indian Probate Reform Act of 2004, National Extension Risk Management Education Conference, Phoenix, AZ.
- Goetting, Marsha A. (April 2005). "Managing Property Title Risk for Montana Farm/Ranch Operators." Extension Risk Management Education Conference, Kansas City, MO.
- Cramer, Corinne and Goetting, Marsha A., (November 2003). "Track'n Your Savings Goals." Association for Financial Counseling and Planning Educators Conference Proceedings. Savannah, GA.
- Goetting, Marsha A., (November 2003). "Creating Financial Champions–Potpourri of Resources for Teaching Kids About Money". Association for Financial Counseling and Planning Educators Conference Proceedings. Savannah, GA.
- Haynes, Debby and Goetting, Marsha A., (November 2002). "Using Financial Calculators to Teach College Students Lessons about Credit Using a Peer Educator Model." Western Family Economics Educators Conference Proceedings. Scottsdale, AZ.
- Goetting, Marsha A. (October 2000). "Using Short Stories to Teach How Property Passes Upon Death of the Owner." Western Region Home Management Family Economics Educators Conference Proceedings. Denver, CO.
- Goetting, Marsha A. (November 1999). "Planning for the Passing of Land on Native American Reservations to Avoid Fractionation." Association for Financial Counseling and Planning Education Conference Proceedings. Phoenix, Arizona. pp. 169-177.
- Goetting, Marsha A. (February 1992). "Interactive Newsletter Series--An Evaluation." Southeastern Family Economics Conference Proceedings. Columbus, OH, pp. 149-154.
- Goetting, Marsha A. (October 1991). "Tracking Money the Easy Way." Association of Financial Counseling and Planning Education 1991 Proceedings. Kansas City, Kansas. pp. 160-168.
- Goetting, Marsha A., Mason, Bernice (September 1991). "How a Financial Calculator Can Help Secondary Students Make Decisions About Their Finances." National Rural Families Conference Proceedings. Kansas State University, Manhattan, Kansas. pp. 37-39.

- Goetting, Marsha A. (February 1991). "Montana's Women's Financial Management Program--An Evaluation." Conference Proceedings, Southeastern Family Economics Conference. Auburn, Alabama. pp. 339-347.

- Goetting, Marsha A. (February 1991). "Telelecture Inservice Education." Conference Proceedings, Southeastern Family Economics Conference, Auburn, Alabama. pp. 348-351.

- Goetting, Marsha A., Irene Hathaway, and Cherry Cowan. (November 1990). "Evaluation of Computerized Budget Analysis Program--DOLLAR WATCH." Conference Proceedings, Western Regional Home Management-Family Economics Educators Conference. Albuquerque, New Mexico. pp. 44-46.

- Goetting, Marsha A. (April 1984). "Evaluation of an Extension Learn-at-Home Series on Individual Retirement Accounts." Selected Proceedings, National Family Economics Extension Specialists' Workshop. Denver, Colorado. pp. 103-107.

- Goetting, Marsha A. (November 1982). "Estate Planning Evaluation--Montana." Conference Proceedings, 22nd Annual Western Regional Home Management-Family Economics Educators Conference. Portland, Oregon. pp. 62-64.

- Goetting, Marsha A. (November 1982). "The Economic Contribution of the Farm or Ranch Wife to the Agricultural Business." Conference Proceedings, 22nd Annual Western Regional Home Management-Family Economics Educators Conference. Portland, Oregon. pp. 65-68.

PRESENTATIONS

Refereed Paper Presentations

- Schumacher, Joel, and Goetting, Marsha A. (November 2011) "Building Partnerships and Utilizing Technology to Reach Employed Adults, Association for Financial Counseling Planning Education Conference, Jacksonville, FL.

- Goetting, Marsha A. (October 2006), "Alzheimer's Series," National Association of Family & Consumer Sciences, Denver, CO.

- Goetting, Marsha A. (April 2005). "Managing Property Title Risk for Montana Farm/Ranch Operators." Extension Risk Management Education Conference, Kansas City, MO.

- Muske, Glenn; Goetting, Marsha A; and Vukonich, Merrylee. (October 2000). "Teaching Retirement and Family Resource Management Using the Web." American Council on Consumer Interests Conference.

- Goetting, Marsha A.; Raiser, Lorrie; Martin, Peter; Poon, Leonard and Johnson, Mary Ann. (November 1994). "Older Women's Financial Resources." Gerontological Society of America, Atlanta.

- Goetting, Marsha A. (October 1987). "Economic Contribution of Extension Home Economics Programs." National Association of Extension Home Economists Conference, Louisville, Kentucky.

- Goetting, Marsha A. (November 1987). "How a Financial Calculator Can Help Families in Economic Crisis Make Decisions." Rural Families in the Midwest Conference, Kansas State University, Manhattan, Kansas.

- Goetting, Marsha A.; Muggli, Gayle. (October 1987). "Financial Decision Making With a Financial Calculator." National Association of Extension Home Economists Conference, Louisville, Kentucky.

- Goetting, Marsha A. (December 1983). "Evaluation Process for a Study-at-Home Series on Estate Planning." National Extension Staff Development Workshop on Evaluation and Accountability, Denver, Colorado.

Refereed Poster Presentations

- Goetting, Marsha A. (March 2002). “Financial Security in Later Life Conference.” Cooperative Extension System Initiative Rollout Conference, Myrtle Beach, South Carolina.

- Muske, Glenn; Goetting, Marsha A.; Vukonich, Merrylee. (November 1999). “The Internet: A Training Tool for Cooperative Extension.” Association for Financial Counseling and Planning Education, Phoenix, Arizona.

- Goetting, Marsha A. (November 1998). "Tracking Systems that Work," Association for Financial Counseling and Planning Education, Ft. Lauderdale, Florida.

- Goetting, Marsha A. (September 1998). "Estate Planning: the Basics," Western Region Home Management Family Economics Educators’ Conference, Salt Lake City, Utah.

- Goetting, Marsha A.; Martin, Peter; Johnson, Christine. (November 1996). "Older Adults and Financial Bequests," Gerontological Society of America, Washington, DC.

- Goetting, Marsha A. (November 1991). "How a Financial Calculator Can Help Secondary Students Make Decisions About Their Finances", Western Region Family Economics Educators Conference, Denver, Colorado.

- Goetting, Marsha A. (November 1991). "Using a Register to Track Family Cash, Credit, and Check Expenditures," Western Region Family Economics Educators Conference, Denver, Colorado.

- Goetting, Marsha A. (October 1991). "Credit Control," Association of Financial Counseling and Planning Education, Kansas City, Kansas.

- Goetting, Marsha A. (February 1988). "Check Register Tracking System," National Family Economics Extension Specialist Workshop, Chicago, Illinois.

- Goetting, Marsha A. (February 1988). "How a Financial Calculator Can Help You Make Decisions," National Family Economics Extension Specialist Workshop, Chicago, Illinois.

Invited Presentations (National, Regional, Other States) (since 1990)

- Goetting, Marsha A. (September 2016). "How to Teach Estate Planning at the State and County Level." National Extension Association of Family and Consumer Sciences, Big Sky, MT.
- Goetting, Marsha A. (November 2011). "Using Response Clickers for Estate Planning Programs." North Dakota Extension Agents, Bismark, ND.
- Goetting, Marsha A. (November 2010). "Using Response Clickers for Audience Feedback and Interactivity." Association for Financial Counseling and Planning Educators Conference, Denver, Co.
- Goetting, Marsha A. (July 2008). "What's the Financial Status of American Women? Perception vs. Reality," National Conference of State Legislatures, New Orleans, LA.
- Goetting, Marsha A. (August 1999). "High School Financial Planning Program Evaluation," National Endowment for Financial Education, Denver, CO.
- Goetting, Marsha A. (April 1998). "Financial Aspects of Mobilization," Michigan National Guard, East Lansing, Michigan.
- Goetting, Marsha A. (April 1996). "Who Makes Wills and Bequests," Iowa Extension Service Annual Update, Ames, Iowa.
- Goetting, Marsha A. (April 1994). "How A Financial Calculator Can Help You Make Decisions." Iowa Home Economics Association Conference, Iowa City, Iowa.
- Goetting, Marsha A. (June 1992). "Montana's High School Financial Planning Program," College for Financial Planning, Denver, Colorado.
- Goetting, Marsha A. (March 1992). "Financial Decision Making." Wyoming Extension Home Economists, Thermopolis, Wyoming.
- Goetting, Marsha A. (November 1991). Discussant, "Support of Children by Non-Custodial Fathers." Western Region Family Economics Home Management Educator's Conference, Denver, Colorado.
- Goetting, Marsha A. (August 1990). "Financial Calculators for Vocational Teachers." Nevada Vocational Association Annual Meeting, Reno, Nevada.
- Goetting, Marsha A. (August 1990). "Marketing Accountability of Vocational Programs." Nevada Vocational Association, Reno, Nevada.
- Goetting, Marsha A. (May 1990). "Financial Calculators and Decision Making." Women's Day, YWCA, Minneapolis, Minnesota.
- Goetting, Marsha A. (May 1990). "How a Financial Calculator Can Help You Make Decisions." College of St. Thomas, Minneapolis, Minnesota.

EXTENSION POPULAR PUBLICATIONS

MontGuides (Fact Sheets) *since 2004*

- Montana Medical Care Savings Accounts for 2017 Tax Year, (co-author Brian Olsen; Montana Department of Revenue), Revised December 2017
- Health Care Savings Account (HSAs) (co-author Joel Schumacher), Revised November 2017
- Dying Without a Will in Montana: Who Receives Your Property? Revised September 2017
- Developing a Spending Plan (co-author Keri Hayes-MSU Publications Assistant and Joel Schumacher-MSU Extension Economics Associate Specialist), Revised June 2017
- Talking with Aging Parents About Finances, (co-author Vicki L. Schmall, Ph.D., former Extension Gerontology Specialist and Professor, Oregon State University, Corvallis), Revised June 2017
- Cremation (co-author Keri D. Hayes; MSU Extension Economics Publications Assistant), Revised April 2017
- Your Important Papers–What to Keep and Where (co-author Katelyn Andersen; Ravalli County Extension Agent, Keri Hayes; MSU Extension Publications Assistant), Revised April 2017
- Letter of Last Instructions, Co-author Joel Schumacher; MSU Extension Economics Associate Specialist, Adele Stenson; former Pondera County Extension Agent, Revised March 2017
- Premarital Agreement Contracts in Montana: Financial and Legal Aspects, Revised March 2017
- Remarried Families: Making Financial Decisions, Revised March 2017
- Nonprobate Transfers, Revised March 2017
- Who Gets Grandma's Yellow Pie Plate?: Transferring Non-Titled Property, (co-author Marlene S. Stum-University of Minnesota), Revised March 2017
- Long-Term Care Partnership Insurance in Montana, (Co-Author Christina Goe, Insurance Division-Office of the Commissioner of Securities and Insurance; Joel Schumacher, Associate Specialist, MSU Extension), Revised March 2017
- Accessing a Deceased Person’s Financial Accounts, Revised February 2017
- Estate Planning in Montana: Getting Started, Revised February 2017
- Will, Revised February 2017
- Estate Planning for Families with Minor and/or Special Needs Children, Revised February 2017
- Settling an Estate: What Do I Need to Know (Co-author Joel Schumacher, Associate Specialist, MSU Extension), Revised February 2017
- Schedule of Non-Monthly Living Expenses, (Co-author Keri Hayes, MSU Extension Publications Assistant), Revised February 2017
- Federal Estate Tax, Revised January 2017
- Gifting: A Property Transfer Tool of Estate Planning, Revised January 2017
- Glossary of Estate Planning Terms, Revised January 2017
- Life Insurance: An Estate Planning Tool, Revised January 2017
- Revocable Living Trusts, Revised January 2017
- What Are Your Rights Over Your Remains, Co-author Jane Wolery (Teton County Extension Agent), Revised January 2017
- Montana Rights of Terminally Ill Act, Revised December 2016
- Probate in Montana, Revised November 2016
- Personal Representative Responsibilities, Revised November 2016
- Transferring a Montana Vehicle Title After the Death of an Owner (co-author Kendra Seilstad-Blaine County Extension Family and Consumer Sciences Agent and Nancy Hargrove-Department of Justice Motor Vehicle Division), NEW October 2016

- Montana Uniform Transfers to Minor Act (UTMA): Custodial Accounts for Children Under Age 21, Revised September 2016
- Beneficiary Deeds in Montana (co-author Kristen Juras), Revised August 2016
- Using a Homestead Declaration to Protect Your Home from Creditors, (199815), Revised March 2016
- How to Transfer Real Property Owned in a Joint Tenancy or in a Life Estate Without Probate (co-author Jackie Rumph-Yellowstone County Family and Consumer Sciences Agency and Keri Hayes, MSU Extension Publications Assistant), NEW February 2016
- Medicaid & Long-Term Care Costs (co-authors Nancy Clark and Barbara Flamand; Montana Department of Public Health and Human Services, Joel Schumacher) (199511), Revised May 2015
- Life Estates: A Useful Estate Planning Tool (co-author Joel Schumacher), Revised July 2015. (200510)
- Property Ownership, Revised July 2015
- Montana Common Law Marriage and Estate Planning, New December 2014
- Using a Bypass Trust to Provide for Children from Remarried, Step and Blended Families, New September 2014
- Estate Planning Tools for Owners of Pets & Companion or Service Animals, New September 2014
- Provider Orders for Life-Sustaining Treatment (POLST) (co-author Virginia Knerr, Broadwater County; Linda Williams, Choteau County), Revised July 2014
- Montana End-of-Life Registry, Co-author Tim Fox; Montana Attorney General and Virginia Knerr, Former Broadwater County Extension Agent, Revised February 2014
- Power of Attorney, co-author Edwin Eck (School of Law-University of Montana) Revised March 2013
- Selecting an Organizational Structure for Your Business (co-author Joel Schumacher), Revised June 2013
- Annuities--Estate Planning and Retirement Tool. Revised November 2013
- Track'n Your Savings Goals, Web Revisions March 2010
- Lending Money to Family Members, Web Revisions July 2010
- Settling an Estate: What Do I Need to Know, co-author Joel Schumacher, New July 2010
- Using a Check Register to Track Your Expenses, Revised February 2009
- Shopping for an Individual Retirement Account (IRAs), Co-author Joel Schumacher, Revised July 2009
- Individual Retirement Accounts (IRAs), Co-author Joel Schumacher, Revised August 2009
- First-Time Homebuyer Savings Account, Co-author Brian Nelson, Montana Department of Revenue, Web Revisions September 2009
- First-Time Home Buyer Savings Accounts (co-author Brian Olsen-Montana Department of Revenue), Revised June 2008
- Designating Beneficiaries Through Contractual Arrangements, Revised March 2007
- Transferring Your Farm or Ranch Property to the Next Generation Through a QTIP Trust, co-author Joel Schumacher, Revised April 2007
- Inheriting an IRA: Planning Techniques for Primary Beneficiaries, co-author Kristen G. Juras, (200310), Revised March 2006
- Inheriting an IRA: Planning Techniques for Successor Beneficiaries, co-author Kristen G. Juras, (200311), Revised May 2006
- Selecting a Credit Card, co-author Elizabeth E. Gorham, Revised July 2006
- Replacing Those VIPS: Very Important Papers (co-author Keri Hayes), Revised January 2005
- Investing in Certificates of Deposit (co-author Joel Schumacher), Revised October 2005
- What to Do When You Lose Your Job, Revised April 2004

Bulletins (Twelve pages or more) (since 1989)

- Transferring Your Farm or Ranch to the Next Generation. Co-authors: Sharon Danes-Minnesota Extension Service, Virginia Knerr-Former MSU Extension Agent, Chuck Leitfeld-Former Minnesota Extension Service Agent, Garry Bradshaw-Former Management Specialist-Alberta Agriculture, Revised February 2015. EB 149.
- Using a Financial Calculator to Help You Make Decisions. 2000. EB 156.
- Making Financial Decisions at Marriage Dissolution–A Montana Guide. 1999. EB 155.
- Check Register Tracking System, (with Judith Ward). August 1989. EB 50.

Other (Sections in notebooks and newsletters distributed statewide)

- A Helping Hand for Caregivers of Elderly (co-author Joel Schumacher), Tenderhearts Notebook, Summer 2007.
- Transferring Your Farm/Ranch to Next Generation, (co-author Susie Taylor). Beef Question and Answers newsletter. December 1999.

Fact Sheets (Planning for the Passing of Reservation Lands to Future Generations)**:**

- What is AIPRA and how does it affect you?, Goetting, M., Ruppel, K., March 2007.
- Fractionation: Inherited undivided interest, Goetting, M., Ruppel, K., March 2007.
- How reservation land is owned?, Goetting, M., Ruppel, K., March 2007.
- Your Individual Trust Interest (ITI) Report: How to read it?, Goetting, M., Ruppel, K., March 2007.
- Who is eligible to inherit your trust land and retain trust status?, Goetting, M., Ruppel, K., March 2007.
- Your undivided interests of 5% or more: What happens if you pass away without a written will?, Goetting, M., Ruppel, K., March 2007.
- Your undivided interest of less than 5%: What happens if you pass away without writing a will?, Goetting, M., Ruppel, K., March 2007.
- What is a life estate?, Goetting, M., Ruppel, K., March 2007.
- Writing a will, Goetting, M., Ruppel, K., March 2007.
- Purchase options at probate, Goetting, M., Ruppel, K., March 2007.
- Partitioning an allotment, Goetting, M., Ruppel, K., March 2007.
- Ways to avoid further fractionation of reservation land, Goetting, M., Ruppel, K., March 2007.
- Your Individual Indian Money (IIM) account: What happens to your money if you pass away without a written will?, Goetting, M., Ruppel, K., March 2007.
- Definitions, Goetting, M., Ruppel, K., March 2007.

Teaching Units (Since 2001)

- Montana $aves $cavenger Hunt: Ages 11 - 14 (Co-author Keri Hayes, Extension Publications Assistant) (partnership with Montana Credit Unions for Community Development, The First Interstate BancSystem Foundation, Montana Consumer Protection Division-Office of the Attorney General, Montana Commissioner of Securities and Insurance, Montana Society of Certified Public Accountants (MSCPA) Legal Foundation, Montana Bankers Association Education Endowment Fund for the Montana Community Foundation, Montana 4-H Foundation) (co-author Keri Hayes, Extension Publications Assistant). 2014, 318 participants.
- Montana $aves $cavenger Hunt: Ages 15 – 19 (Co-author Keri Hayes, Extension Publications Assistant) (partnership with Montana Credit Unions for Community Development, The First Interstate

BancSystem Foundation, Montana Consumer Protection Division-Office of the Attorney General, Montana Commissioner of Securities and Insurance, Montana Society of Certified Public Accountants (MSCPA) Legal Foundation, Montana Bankers Association Education Endowment Fund for the Montana Community Foundation, Montana 4-H Foundation) (co-author Keri Hayes, Extension Publications Assistant). 2014; 358 participants.

- Montana $aves $cavenger Hunt ages 14 - 19 (partnership with Montana Credit Unions for Community Development and The First Interstate BancSystem Foundation) (co-author Keri Hayes, Extension Publications Assistant). 2013, 284 participants.
- Provided 1,647 purchasers of the Estate Planning: The Basics packet about updated Federal Estate Tax and Gift Tax and other revised MontGuides, 2013.
- Financial Check Up Notebook, Goetting, Marsha A. and Schumacher, Joel, Horizons Alumni, 2011.
- Get a Grip on Your Money Financial Packet, co-sponsors First Interstate BancSystem Foundation & Montana Credit Unions for Community Development, distributed to over 450 Montanans, December 2008.
- Small Steps to Health & Wealth, Hayes, K., Goetting, M., Web site (www.montana.edu/sshw) 2008.
- Planning and Saving for Retirement, Hayes, K., Goetting, M., Web site (www.montana.edu/extensionecon/retirement.html) 2008.
- Credit $marts Helping You Become Credit $avvy, Hayes, K., Goetting, M., Web site (www.montana.edu/extensionecon/creditsmarts.html), May 2007.
- MSU Indian Land Symposium Web site, Hayes, K., Goetting, M., Web site (www.montana.edu/indianland/symposium), July 2007.
- American Indian Land Probate Reform Act (AIPRA) Fact Sheets, Web site (www.montana.edu/indianland/factsheets.html), September 2007.
- Dying Without a Will in Montana, Web site (www.montana.edu/dyingwithoutawill), September 2007.
- Estate Planning for the Next Generation Web site (www.nextgeneration.montana.edu), September 2007.
- Get Smart About Credit, Revised 2006.
- Teach Children to Save, 2004.
- Credit Cards: Avoid the Minimum Payments Trap, 2004.
- Quicken for Family Finance, 2001.
- Montana Medical Care Savings Accounts, 2001.
- Medicaid and Long Term Care Costs, 2001.

Study-at-Home Courses (since 2001)

- Quicken 2001 & 2002 Family and Personal Resources, 2001, 9 sessions.
- Planning for the Passing of Ft. Belnap Lands to Future Generations, October 2001, 7 lessons.
- Planning for Passing of Crow Lands to Future Generations, 2001, 6 lessons.
- Estate Planning: The Basics. Revised 2001, 15 part series.

Interactive CD

- Ruppel, K., Goetting, M., Hayes, K., *Inheriting Indian Land Indian Land Tenure in the Wake of the American Indian Probate Reform Act,* April 2007.
- Hayes, K., Goetting, M., *Dying Without a Will in Montana* CD & Website, September 2007.

Popular Press Publications, Radio, and Television (since 2012):

<u>2017</u>

- Goetting, M., Sutton, Jackie, "*Gifting: A living legacy and gift taxes*," Dillon Tribune Insert. (December 6, 2017).
- Goetting, M., Sutton, Jackie, "*Achieving a Better Life Experience Accounts (ABLE)*," KGEZ Kalispell. (November 28, 2017).
- Goetting, M., Sutton, Jackie, "*Gifting while alive vs. bequesting after death*," KGEZ Kalispell. (November 28, 2017).
- Goetting, M., Sutton, Jackie, "*Giving Away Personal Items as Holiday Gifts*," Dillon Tribune Insert. (November 22, 2017).
- Goetting, M., Sutton, Jackie, "*Montana Medical Care Savings Accounts*," Dillon Tribune Insert. (November 15, 2017).
- Goetting, M., Sutton, Jackie, "*How to transfer property held in joint tenancy to the survivor*," Dillon Tribune Insert. (November 8, 2017).
- Goetting, M., Sutton, Jackie, "*How title affects who receives property at your death*," Dillon Tribune Insert. (November 1, 2017).
- Goetting, M., Sutton, Jackie, "*Communicating about Estate Planning*," Dillon Tribune Insert. (October 25, 2017).
- Goetting, M., Sutton, Jackie, "*Beneficiary Deeds*," Dillon Tribune Insert. (October 18, 2017).
- Goetting, M., Sutton, Jackie, "*Power of Attorney*," Dillon Tribune Insert. (October 11, 2017).
- Goetting, M., Sutton, Jackie, "*Dying Without a Will*," Dillon Tribune Insert. (October 1, 2017).
- Goetting, M., "*Open a Montana Medical Care Savings Account (MSA) Before December 29, 2017 for tax savings*," Lives and Landscapes. (September 2017).
- Goetting, M., "*Beneficiary deeds and Death Taxes*," Montana AgLive. (September 24, 2017).
- Goetting, M., "*First Time Home Buyer Accounts*," KGEZ Kalispell. (September 13, 2017).
- Goetting, M., "*Estate planning for farmers*," PNC Agricultural Newsletter. (August 15, 2017).
- Goetting, M., "*Montana Medical Care Savings Accounts*," KGEZ Kalispell. (August 10, 2017).
- Goetting, M., "*Estate Planning for Pets*," KGEZ Kalispell. (July 27, 2017).
- Goetting, M., "*Gifts to the Montana 4-H Foundation and Experience Amazing Tax Savings from the Montana Endowment Tax Credit*," Montana 4-H Foundation. (June 2017).
- Goetting, M., "*Transferring Joint Tenancy Real Property Without Probate*," Big Sky Acres. (May 2017).
- Goetting, M., "*Estate planning aspects of property ownership*," KGEZ Kalispell. (May 4, 2017).
- Goetting, M., "*Dying Without A Will*," Montana Senior News. (April 2017).
- Goetting, M., "*Legacy Planning*," KGEZ Kalispell. (April 26, 2017).
- Goetting, M., "Probate avoidance tools," KGEZ Kalispell. (March 16, 2017).
- Goetting, M., "*Montana Legacy (Bequest) Tools*," MSU Alumni Foundation. (March 3, 2017).
- Goetting, M., "*Basic Estate Planning Workshop Coming To Sanders County*," Sanders County Ledger. (February 2017).
- Goetting, M., "*Using Contracts as a Part of Your Estate Plan*," Sanders County Ledger. (February 2017).
- Goetting, M., "*Montana's 120 hour survival requirement for heirs*," KGEZ Kalispell. (February 16, 2017).
- Goetting, M., "*MSU Extension offers information for seniors on Montana Homeowner/Renter Tax Credit*," MSU Communication Services. (February 10, 2017).

- Goetting, M., "*How the Montana Endowment Tax Credit Could Benefit the Montana 4-H Program,*" Montana 4-H Foundation. (January 2017).
- Goetting, M., "T*ransferring Joint Tenancy Real Property Without Probate,*" Big Sky Acres. (January 26, 2017).
- Goetting, M., "*Money Management Ideas,*" KGEZ Kalispell. (January 17, 2017).

2016

- Goetting, M., *"My IRA,"* KGEZ-Kalispell, Radio, January 5, 2016
- Goetting, M., "*Avoid Probate of Real Property with a Montana Beneficiary Deed*," Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, January 15, 2016
- Goetting, M., *"Home Equity and Reverse Mortgages: Advantages and Disadvantages,"* KGEZ-Kalispell, Radio, February 9, 2016
- Goetting, M., *"What Parents With Minor Children Should Know About Estate Planning,"* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, February 15, 2016
- Goetting, M., *"Credit Card Debt,"* KGEZ-Kalispell, Radio, March 9, 2016
- Goetting, M., *"Creative Giving Plans to Support MSU,"* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, February 15, 2016
- Goetting, M., *"How Beneficiary Deeds Avoid Probate,"* KGEZ-Kalispell, Radio, April 6, 2016
- Goetting, M., Montana Community Access Television (TV), Taped Estate Planning program sponsored by Montana Aging Services, AARP Montana, and Montana Geriatric Center of the University of Montana, April 13, 2016
- Goetting, M., *"Probate,"* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, October 28, 2016
- Goetting, M., *"The Tale of Champ and the Montana Endowment Tax Credit,"* MSU Alumni Foundation, May 15, 2016
- Goetting, M., *"What Are Your Rights Over your Remains in Montana,"* KGEZ-Kalispell, Radio, June 29, 2016
- Goetting, M., *"Life Estates, Joint Tenancies and Tenancy in Common,"* KGEZ-Kalispell, Radio, July 25, 2016
- Goetting, M., *"Gifts of Stocks and Mutual Funds,"* MSU Alumni Foundation, August 15, 2016
- Goetting, M., *"Trusts: Living and Testamentary,"* KGEZ-Kalispell, Radio, July 25, 2016
- Goetting, M., *"Wills,"* KGEZ-Kalispell, Radio, September 29, 2016
- Goetting, M., *"Death Taxes: Much ado About Nothing for 99% of Montanans,"* MSU Alumni Foundation, October 15, 2016
- Goetting, M., *"Wills,"* KGEZ-Kalispell, Radio, September 29, 2016
- Goetting, M., *"MSU Extension Offers News MontGuide on Transferring Montana Vehicle Title After Death of Owner,"* MSU Communication News Services, November 11, 2016
- Goetting, M., *"How Champ Uses the Montana Endowment Tax Credit,"* MSU Alumni Foundation, November 15, 2016
- Goetting, M., *"Saving vs. Credit,"* KGEZ-Kalispell, Radio, November 29, 2016
- Goetting, M., *"MSU Check Register Tracking System—Try It You'll Like It,"* MSU Communication News Services, December 5, 2016
- Goetting, M., *"To Have a Trust or Not to Have a Trust…That is the Question,"* MSU Alumni Foundation, December 15, 2016

2015

- Goetting, M., *"Dying Without a Will in Montana,"* Bozeman Daily Chronicle, January 20, 2015
- Goetting, M., *"Intergenerational Estate Planning,"* Agweek Magazine, Grand Forks, ND, January 22, 2015
- Goetting, M., *"Montana's Elderly May Be Eligible for 2014 Homeowner/Renter Tax Credit for a Portion of Their Property Taxes or Rent Paid, Based On Their Income,"* MSU News Service, January 27, 2015
- Goetting, M., *"How Property is Titled Affects Transfer at Death,"* Missoulian, April 2, 2015
- Goetting, M., *"How Property Titled Affects Who Receives it After You Die,"* Montana Family Forest News, April 15, 2015
- Goetting, M., *"The Power of Property Titles,"* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, July 17, 2015
- Goetting, M., *"Using Contracts as a Part of Your Estate Plan,"* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, August 15, 2015
- Goetting, M., *"Montana Medical Care Savings Accounts (MSA)—An Overlooked Estate Planning Tool,"* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, September 15, 2015
- Goetting, M., *"Dying Without a Will,"* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, October 15, 2015
- Goetting, M., *"Power of Attorney,"* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, November 15, 2015
- Goetting, M., *"Open a Montana Medical Savings Account before Dec 31 for 2015 tax savings,"* MSU News Service, November 25, 2015
- Goetting, M., *"Gifting: A Living Legacy,"* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, December 15, 2015

2014

- Goetting, M., *"Montana Youth Savings Lessons and $100 Price Drawing Available,"* MSU News Service, November 2014
- Goetting, M., *"Open a Montana Medical Savings Account before December 31 for 2014 Tax Savings,"* MSU News Service, November 2014
- Goetting, M., *"Communicating About Estate Planning and Finances Easier said than done,"* Big Timber Pioneer Press, July 2014
- Goetting, M., *"Succession and Transfer Planning for the Next Generation of Montana Farmers and Ranchers,"* Big Timber Pioneer Press, June 2014
- Goetting, M., *"Estate Planning and Montana's Long-Term Care Partnership Program,"* Big Timber Pioneer Press, May 2014
- Goetting, M., *"Power of Attorney,"* Big Timber Pioneer Press, April 2014
- Goetting, M., *"Death Taxes: Much ado about nothing or more than 99% of Montanans,"* Big Timber Pioneer Press, March 2014
- Goetting, M., *"Why Probate,"* Big Timber Pioneer Press, February 2014
- Goetting, M., *"After Holiday's Buyer's Remorse and How to Deal with the Resulting Stress,"* MSU News Services, February 2014
- Goetting, M., *"Seniors Should Apply for Montana Homeowner/Renter Tax Credit,"* MSU News Services, February 2014
- Goetting, M., *"Have the foresight to make an estate plan"* MSU News Services, January 2014

- Goetting, M., *"Free Extension information helps Montanans know what happens if they die without a will"* MSU News Services, January 2014
- Goetting, M., *"How title affects who receive it after you die"* Big Timber Pioneer News, January 2014
- Goetting, M., *"Power of Attorney"* Aging Horizons Department of Public Health and Human Services, January 2014
- Goetting, M., *"What are some of the consequences of holding property in joint tenancy with relatives"* Aging Horizons Department of Public Health and Human Services, January 2014
- Goetting, M., *"What is a separate listing of tangible personal property and how can it benefit you"* Aging Horizons Department of Public Health and Human Services, January 2014
- Goetting, M., *"How Payable on Death Designations and Transfer on Death Registrations can help you avoid probate"* Aging Horizons Department of Public Health and Human Services, January 2014
- Goetting, M., *"How Beneficiary Deeds for Real Property Can Avoid Probate"* Aging Horizons Department of Public Health and Human Services, January 2014

2013

- Goetting, M., *"Seniors Encourage to Apply for Montana Homeowner/Renter Tax Credit,"* MSU News Service, February 2013
- Goetting, M., "*Transferring Your Farm Or Ranch to Next Generation*", Dillon Tribune, March 2013
- Goetting, M., *"Dying Without a Will"* Big Timber Pioneer, September 2013
- Goetting, M., "*Transferring Your Farm Or Ranch to Next Generation*" with Jesse Fulbright Liberty County, October 2013
- Goetting, M., *"What Parents with Minor Children Should Know About Estate Planning"*, Big Timber Pioneer, October 2013
- Goetting, M., *"Beneficiary Deeds in Montana"*, Big Timber Pioneer, November 2013
- Goetting, M., *"MSU Extension Offers Advice on Tax Benefits of Medical Care Savings Accounts before Dec. 31,"* MSU News Service, November 2013
- Goetting, M., *"Montana Medical Care Savings Account (MSA): An Estate Planning Tool*, Big Timber Pioneer, November 2013
- Goetting, M., *"Using Contracts as Part of Your Estate Plan"*, Big Timber Pioneer, December 2013

2012

- Goetting, M., "Seniors Should Apply for Montana Homeowner Renter Tax Credit" News Release from MSU Communication Services, January 26, 2012
- Provided information to Carly Flandro, Bozeman Chronicle for article, "From One Generation to Next" February 3, 2012
- Provided information to Lisa Schmidt for article "Five Simple Tips to Start Planning Your Estate" Western Ag Reporter, March 12, 2012
- "Who Gets Your Property When You Die," Montana Policy Review, Volume 16, No. 1, Spring 2012
- "Back to the Basis Financial Advice" interviewed by Laura Tode for MAGIC Billings City Magazine, May 2012, p. 108
- "MSU Extension Offers New Guide on Long-Term Care Insurance" News Release from MSU Communication Services, June 21, 2012
- "Long-Term Care Partnership Insurance Program" Montana Pioneer, July 2012

- "POLST Guide Available" The Roundup, Summer 2012
- "Using a Homestead Declaration to Protect Your Home From Creditors" Big Sky Acres, Winter 2012
- "Transferring Your Farm or Ranch to the Next Generation" co-author Jesse Fulbright (Liberty County Extension Agent), Great Falls Tribune, November 14, 2012

INSTRUCTIONAL ACTIVITIES

Extension Presentations (Since 2005)

Year	Number of Classes	Number of Participants	Subjects
2017	60	1,840	Beneficiary Deeds, Legal and Financial Steps to Take Before and After Diagnosis of Alzheimer's, Living Trusts, Montana Endowment Tax Credit, Payable on Death Designations, Probate, Property Ownership, Transfer on Death Registrations, Who Gets Your Property When You Die, Wills
2016	76	2,846	Beneficiary Deeds, Charitable Giving, Montana Endowment Tax Credit, Living Trusts, Long-Term Partnership Insurance, Payable on Death Designations, Probate, Property Ownership, Transfer on Death Registrations, What Are Your Rights Over Your Remains, Who Gets Your Property When you Die, Wills
2015	50	1,331	Estate planning, payable on death designations, transfer of death registrations, property ownership, federal estate and gift taxes, beneficiary deeds, who gets your property when you die, Montana intestacy statues, probate, personal representatives, homestead allowances, wills, and living trusts.
2014	36 Online Classes: 2	1,564 676 enrolled	Estate Planning, Medical Care Savings Accounts, Provider Orders for Life Sustaining Treatment (POLST), Medicaid and Long-Term Care Costs, Long-Term Care Partnership Insurance in Montana, How Title Affects Who Receives Your Property Upon Death, With or Without a Will, Advanced Directives: What Are They and Why Should You Have Them, Montana $aves $cavenger Hunt ages 11-14, Montana $aves $cavenger Hunt ages 15-19.

Year	Number of Classes	Number of Participants	Subjects
2013	44	2,908	Estate Planning: the Basics, Estate Planning for Landlords, Estate Planning for Married Couples Without Children, Estate Planning for Singles, Estate Planning Tools that Avoid Probate, Estate Planning for Young Farm Ranch Couples, Families, Legacies & Estate Planning, Get a Grip on Your Money, Passing the Family Farm, Probate, Personal Representatives, Property Titles, Retirement Planning for Those 3 to 5 years from Retirement, Talking With Aging Parents About Finances, Transferring Your Farm or Ranch to Next Generation, What Married Couples With Children Need to Know About Estate Planning, Who Gets Your Property When You Die, Why Estate Planning is Important to Family Business Owners
2012	59	1,997	American Indian Probate Reform Act (AIPRA), Avoiding Probate, Cremation, Dying Without a Will, Estate Planning for Farmers, Estate Planning for Townees, Estate Planning for Gays and Lesbians: What They and Their Families Should Know, Estate Planning for Young Families, Estate Planning for Retirees, Get a Grip on Your Money, Gifting, Grandparents: What They Should Know About Estate Planning, Legacy Planning for Next Generation, Long-Term Care Partnership Insurance Program, Montana Medical Care Savings Accounts, PODs/TODs and Beneficiary Deeds, Power of Attorney, PowerPay, Property Ownership, Retirement Planning, Singles and Estate Planning, What Young Farm Ranch Couples Should Know About Estate Planning, Wills and Trusts,
2011	43	1,328	Beneficiary Deeds, Credit Savvy, Estate Planning, Financial Check-Up, Life Estates, Long-Term Care Partnership, Property Ownership, PODS & TODS, Provider Orders for Life-Sustaining Treatment, Trusts, Taxes, Wills
2010	70	1,933	Credit Smarts, Dying Without a Will, Estate Planning for Forestry Landowners, Estate Planning for Next Generation, Estate Planning for Ranchers, Estate Planning for Younger Parents, Estate Planning a Women's Perspective, Family Finances, Financial Potpourri, Federal Estate Tax & Gift Tax, Montana Medical Care Savings Accounts, Montana's End-of-Life Registry, Property Ownership, Property Titles, Power of Attorney, Rights of Terminally Ill Act, Small Steps to Health & Wealth, Trusts & Taxes, Wills

Year	Number of Classes	Number of Participants	Subjects
2009	49	1,280	Avoiding Probate, Accessing Financial Education Needs, Credit Smarts: Helping You Become Credit Savvy, Estate Planning, Federal Estate & Gift Tax, Get a Grip on Your Money, MSU Extension Financial Resources, Passing Your Farm to Next Generation, Property Ownership, PowerPay, Power of Attorney, Retirement Planning, Savings Tools & Techniques, Small Steps to Health & Wealth, Trusts, What Are Your Rights Over Your Remains, Who Gets Your Property When You Die, Wills
2008	67	2,036	American Indian Probate Reform Act (AIPRA), Beneficiary Deeds, Credit Savvy, Estate Planning, Financial Status of American Women, Financial Resources, Get a Grip on Your Money, Land Transfers, Legal & Financial Issues of Alzheimers, PODs & TODs, Property Ownership, Representative Payees & Joint Tenancies, Saving & Investing for Your Future, Small Steps to Health & Wealth, Tracking Your Money, Transferring Land to Next Generation, Will Writing, Who Receives Your Property When you Die?
2007	40	1,258	American Indian Probate Reform Act (AIPRA), Beneficiary Deeds in Montana, Conservatorships, Credit Savvy, Estate Planning, Financial & Legal Aspects of Alzheimer’s, Financial Planning, Financial Issues for Grandparents Raising Grandchildren, Montana Medical Care Savings Accounts, PODs & TODs, Property Titles & Montana Law, Stepped-up Basis vs. Carryover Basis
2006	65	®1,202	Estate Planning, Property Ownership, Estate Planning for Families with Minor Children, Legal and Financial Aspects of Alzheimer’s, Who Get’s Your Property When You Die, Federal and State Estate Planning Laws, American Indian Probate Reform Act, How is your Property Titled, Montana’s End-of-Life Registry, Financial Laws Affecting Montanans, Estate Planning for the Next Generation, Montana Grandparents Raising Grandchildren

Year	Number of Classes	Number of Participants	Subjects
2005	47	1,542	Estate Planning, Property Ownership, Financial Planning, Estate Planning: Tax Law Changes, Indian Probate Law, Transferring Your Farm and Ranch to the Next Generation, Credit Management, Federal Estate Taxes, Legal & Financial Concerns for Alzheimer Caregivers, Retirement Planning, Power of Attorney, Trusts, Planning for the Passing of Reservation Land Under American Indian Probate Act of 2004, High School Financial Planning

In-service Education Presentations Since 2000: (for MSU County Extension Faculty & General Public); Iowa Extension; Wyoming Extension, MSU Employees *In-Service was provided via the Adobe Acrobat System)

- Montana Association of Family and Consumer Sciences, Miles City, April 2017
- Family Economics Update, MSU Family Consumer Science Extension Agents, May 2017
- Family Economics Update, MSU Family Consumer Science Extension Agents, May 2016
- Montana Association of Family and Consumer Sciences, Havre, April 2016
- Montana Association of Family and Consumer Sciences, Hamilton, April 2015
- Family Economics Update, MSU Family Consumer Science Extension Agents, May 2013
- America Saves Webinar, MSU Family Consumer Science Extension Agents, October 2013
- Family Economics Program, New Workers Orientation MSU Extension Agents, December 2013
- Family Economics Program Planning, MSU Family Consumer Science Extension Agents, May 2012
- Creative Ways to Teach Estate Planning, MSU Family Consumer Science Extension Agents, September 2012
- Family Economics Program Planning, MSU Family Consumer Science Extension Agents, December 2012
- Provider Orders for Life-Sustaining Treatment (POLST), Montana Family Consumer Science Extension Agents & Health Care Professionals, May 2011
- Provider Orders for Life-Sustaining Treatment (POLST), Montana Family Consumer Science Extension Agents & Health Care Professionals, November 2011 (Webinar)
- Family Economics Programs, New Extension Agent Orientation, January 2010
- *Grab and Go Mini Programs, Family Economics Webinar Sessions, 8 locations, January 2010
- Retirement Planning, Solid Finances, January 2010
- *Small Steps to Health & Wealth, MSU Wellness Webinar, 4 locations, January 2010
- *Retirement Planning, General Public Webinar, 10 locations, February 2010
- Retirement Planning Considerations for Those 3-5 years from retirement, Solid Finances, February 2010
- *Evaluation Tools, Family Economics Webinar Sessions,, 5 locations, March 2010
- Property Ownership, Solid Finances, March 2010
- Savings & Credit, Horizons Facilitators, Glendive, April 2010
- Savings & Credit, Horizons Facilitators, Helena, April 2010
- Development in Family Economics, April 2010
- *Savings & Credit, Horizon Facilitators, Horizons Webinar, 6 locations, May 2010
- Dying Without a Will, Solid Finances, October 2010
- Topics in Family Economics, New Workers Orientation, October 2010
- Probate, Power of Attorney, Trusts, & Cremation, Solid Finances, November 2010
- *PowerPay, co-developer: Keri D. Hayes (MSU Publications Assistant), Family Economics Webinar Sessions, September 2009
- *Communicating About Estate Planning, co-developer: Keri D. Hayes (MSU Publications Assistant), FSA Webinar Sessions, October 2009
- *Controlling What Happens to Your Remains, co-developer: Keri D. Hayes (MSU Publications Assistant), Family Economics Webinar Sessions, October 2009
- *Wills and Trusts, co-developer: Keri D. Hayes (MSU Publications Assistant), Estate Planning Webinar Sessions, October 2009

- *Savings Tools & Techniques, co-developer: Keri D. Hayes (MSU Publications Assistant), Family Economics Webinar Sessions, November 2009
- *Estate Planning Tools, co-developer: Keri D. Hayes (MSU Publications Assistant), FSA Webinar Sessions, November 2009
- *Federal Estate & Gift Tax, co-developer: Keri D. Hayes (MSU Publications Assistant), Estate Planning Webinar Sessions, December 2009
- Family Economics Programming, March 2008, 12 participants (0.5 hours)
- What's New in Financial Education, July 2008, 31 participants (1.5 hours)
- Retirement Planning, October 2008, 125 participants (1 hour)
- * American Indian Probate Reform Act (AIPRA), January 2007. 17 participants. (1 hour)
- * Montana End-of-Life Registry, February 2007. 19 participants. (1 hour)
- * Beneficiary Deeds, September 2007. 17 participants. (1 hour)
- * High School Financial Planning Program, September 2007. 30 participants. (2 hours)
- * Small Steps to Health & Wealth, December 2007. 32 participants. (2 hours)
- Financial Management, New Laws & Programs, 2006. (3 hours)
- Estate Planning for Retired Faculty. 2005. (1 hour)
- Property Titles & Youth. 2005. (1 hour)
- Family Economics Program Samples. 2005. (15 minutes)
- In-Service Education for MSU Extension Agents. 2005. (45 minutes)
- Credit Cards: Avoid the Minimum Payments Trap. 2004 (2 hrs).
- Track'n Your Savings Goals. 2004 (2 hrs).
- 4-H Financial Champions. 2003 (5 hrs).
- Track'n Your Savings. 2003 (4 hrs).
- Teaching Financial Education: How Can You Get Involved. 2003 (1hr).
- Montana Rights of Terminally Ill Act. 2003 (1.5 hrs).
- Using a Financial Calculator to Teach Financial Concepts in the Classroom. 2003. (2 hrs).
- Financial Security in Later Life. 2002 (4 hours).
- Quicken Personal Finance Training. Sidney & Lewistown. 2001 (24 hours).
- Medicaid & Long Term Care Cost. 2001. (4 hours).
- Montana Medical Care Savings Accounts. 2001. (2 hours)
- Aging Family Economics Issues & Retirement Planning. 2000. (2.5 hours).
- Family Finances. 2000. (2 hours).
- Family Economics Update. 2000. (4 hours).

GRANTS (Since 2003)

- Montana Community Foundation; Funding for Estate Planning presentations in counties; 2017; $5,000
- Montana Community Foundation; Funding for Estate Planning presentations in counties; 2016; $5,000
- Montana Credit Unions for Community Development, Montana $aves $cavenger Hunt; 2014; $1,000
- First Interstate BancSystem Foundation, Montana $aves $cavenger Hunt; 2014; $1,000
- Montana Consumer Protection Division-Office of Attorney General, Montana Saves Scavenger Hunt; 2014; $1,000
- Montana Commissioner of Securities and Insurance, Montana $aves $cavenger Hunt; 2014; $1,000

- Montana Society of Certified Public Accountants (MSCPA) Legacy Foundation, Montana $aves $cavenger Hunt; 2014; $1,000
- Montana Bankers Association Education Endowment Fund of the Montana Community Foundation, Montana $aves $cavenger Hunt; 2014; $1,000
- Montana 4-H Foundation, Montana $aves Scavenger Hunt; 2014; $500
- Montana Credit Unions for Community Development and First Interstate BancSystem Foundation, Montana Saves Scavenger Hunt; December 3, 2013; $3,100
- Consumer Federation of America, America Saves Program, Montana $aves $cavenger Hunt, December 2013; $1,000
- Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2011; $800
- Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2010; $1,000
- Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2009; $1,500
- Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2008; $2,000
- High School Financial Planning Program, National Endowment for Financial Education, 2007; $2,000
- Financial Risks of Dying Without a Will, Western Center for Risk Management Education, Collaborators: Montana Department of Agriculture, State Bar of Montana, and Montana Grain Growers Association, 2006-2009; $40,000
- Risk Management Education: Avoiding Further Fractionation on Montana Reservation Lands under the American Indian Probate Reform Act (AIPRA) Symposium; Goetting, Ruppel, 2006 – 2008; $32,076
- Risk Management Estate Planning: Planning for the Passing of Agricultural Reservation Land to Avoid Further Fractionation under the American Indian Probate Reform Act of 2004, Risk Management Agency Community Outreach and Assistance Partnership, 2005-2008; $130,000
- National Endowment for Financial Education, High School Financial Planning Program, 1990-2000; $16,000.
- Get Smart About Credit, MSU Extension mini-grant, Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2006; $18,000 ($6,000 each)
- Estate Planning for the Next Generation, Western Center for Risk Management Education, 2005; $39,989
- Managing Property Title Risks for Montana Farm/Ranch Operators, Western Center for Risk Management Education, 2004; $34,170.
- Risk Management Estate Planning for Montana Fort-Peck Tribal Members: Planning for the Passing of Agricultural Reservation Land to Avoid Further Fractionation, USDA Risk Management Agency-Community Outreach and Assistance Partnership Program, 2004; $75,000.
- Teach Children to Save, First Interstate BancSystem Foundation, Montana Credit Unions for Community Development, MSU Extension, 2004; $3,245.
- Credit Cards: Avoid the Minimum Payments Trap, First Interstate BancSystem Foundation, Montana Credit Unions for Community Development, 2004; $3,000.
- First Interstate Bank Foundation, 2003; $1,500.
- Montana Credit Unions for Community Development, 2003; $1,500.

PROFESSIONAL MEMBERSHIPS AND OFFICES

National

- National Extension Association of Family and Consumer Sciences, 1977-present
- National Coalition for Consumer Education, 1992-2003.
- Association for Financial Counseling and Planning Education, 1991-present.
- American Association of Family and Consumer Sciences, 1974-present.
- American Council on Consumer Interests (ACCI), 1974-2010.
- Phi Epsilon Omicron (Honorary Association), 1973-2010.
- Omicron Nu (Honorary Association), 1972-2010.

Regional

- Board of Directors, Federal Reserve Board of Minneapolis-Helena Branch, January 2013-December 2016: Vice Chair 2014, 2016 Chair 2015; 2017; Reappointed for three-year term 2016 – 2018.

State

- Montana Gerontology Association, 2007 – present
- Montana Financial Education Coalition, 2003 – present
- Epsilon Sigma Phi (Honorary Association), 1985-present. President, 1992; Vice President, 1990 – 91. Scholarship Chairman, 1986-1991. Membership Chairperson, 1991.
- Montana Association of Extension Family and Consumer Sciences, 1978-present. Public Relations Chairman, 1987-1989. Scholarship Committee Chairman, 1984. Board Member, 1984; 1987.
- Montana Cooperative Extension Association (MCEA), 1978-present. Health Insurance Committee Member, 1980.
- Montana Extension Association of Family and Consumer Sciences, 1978-present. Treasurer 2005 to present. State Meeting Evaluation Form Designer, 1990. Alumni newsletter, 2011-present

SERVICE (Since 2003)

National

- National Extension Association of Family and Consumer Sciences Investment Committee, 2017
- Association for Financial Counseling and Planning Educators (AFCPE) Development Fund, Committee Member, 2013
- Farm Transition Planning Web site Advisory Committee Member, Dale Norquist, Project Director, University of Minnesota, 2008 – 2010.
- International Farm Transition Network Advisory Committee Member, John Baker, Project Director, Iowa State University, 2008 – 2009
- Facilitator, Managing Consumer Credit Round Table: Pre-conference, Association for Financial Counseling Planning Education, Tampa, FL, November 2007
- Planning Committee Member, Extension Risk Management Education Estate Planning: Pre-conference, Phoenix, AZ, April 2007
- External Reviewer for National Extension Association of Family & Consumer Sciences, Promotion & Tenure Candidates, 2004-2009.

- Investment Committee Member, National Extension Association for Family and Consumer Sciences, 2004-2008.
- Estate Planning Committee Member, RMA-Pre Conference, November 2006.
- Talking With Aging Parents About Finances MontGuide was accepted as Featured Resource on Financial Security for All-Community Practice Web site, 2006.
- State Representative for High School Financial Planning Program, 1990-present.
- Association for Financial Counseling and Planning Educators, Reviewer, 6 poster presentations, 2004-2005.
- Selection Committee, Association for Financial Counseling and Planning Educators Distinguished Fellow, 2003.
- External Reviewer, National Extension Association of Family & Consumer Sciences, 2003.

State (since 2006)

- Legal and Financial Committee, Alzheimer's Workgroup, 2017
- Alzheimer Work Group, 2015 - present
- Montana Coalition for Provider Orders for Life-Sustaining Treatment-Committee Member, 2012 to 2016.
- Montana State Health Insurance Advisory (SHIP) Committee Member, 2014 to present
- Montana Financial Education Coalition, Board of Directors, 2003 to present
- Chairperson, Montana Financial Education Coalition Conference, Billings-MT, 2007
- Attorney General, End-of-Life Registry Advisory Council, 2006 – 2011
- Montana Extension Association of Family and Consumer Sciences (MEAFCS), Treasurer, 2010
- MontanaLawHelp State Advisory Committee, 2006 – 2008
- Member, Montana Legal Service Web Site Stakeholder Committee, State Bar of Montana, 2006
- Reviewer, "Advance Directives Made Easy," "Aging Services, Montana Department of Public Health and Human Services, 2006
- MSU Extension End-of-Life links are provided at the Department of Justice; Attorney General; Consumer Protection Division website, 2006

Montana State University

- Masters & Degree Committee Memberships, 2017
  - Kathleen McMahon, Health and Human Development
  - Whitney Salo, Health and Human Development
- Masters & Degree Committee Memberships, 2014 to present
  - Karman Klundt, Health and Human Development
  - Nolore Pearce, Health and Human Development
  - Paul Stoffer, Health and Human Development
- Masters & Degree Committee Memberships, 2010 to present
  - Carrie Fabian, MS Family Financial Management Program
  - Rachel Hubatt, MS Family Financial Management Program
  - Russell Luchsinger, MS Family Financial Management Program
  - Brandon Nissen, MS Family Financial Management Program
- Graduate Representative-Doctorial Committee (Andrew Dahlberg), Summer 2012
- Shared and was present to answer questions about Montana Medical Care Savings Accounts during "Well Check" on the MSU Campus, November 2011
- Masters & Degree Committee Memberships, 2008-2009:

  - Kaylene Drummer, Education, Doctorate Program
  - Richard Marshall Jones, Adult Education Program, Doctorate Program
- Member, Academic Technology Advisory Council, 2007-2009
- Internship Students, 2006:
  - Mary Anne Anderson, Education
  - Hanna Meccage, Health & Human Development
- Member of Masters Graduate Committees, 2006
  - Bernadine Warwood, Health & Human Development Department
  - Margie Haines, Health & Human Development Department
- Graduate Representative Committee Member for two doctoral students, 2005
    - Kadence Drummer
    - Richard Jones
- Member, Health and Human Development, Family & Consumer Sciences Advisory Committee, 2004.
- Reviewer, promotional brochure for Health & Human Development Department, April 2004.
- MSU Extension, Program Planning Committee, October 2004.
- Reviewer Tenure Dossiers, Health and Human Development, 2003-2004.

MSU Departments

- Promotion and Tenure Review Committee Member, Department of Agricultural Economics and Economics, November 2016.
- Tenure Review for Teaching, Department of Agricultural Economics and Economics, February 2015.
- Search Committee Member-Vice Griffith Position, Department of Agricultural Economics & Economics, 2013
- Search Committee Member, Agricultural Economics & Economics Department, 2011
- Promotion and Tenure Review Committee, Department of Ag Econ and Econ, 2011
- Search Committee Member Vice (Hanson position), Agricultural Economics & Economics Department, 2009 - 2010
- Member, Agricultural Economics and Economics Search Committee, Vice (John Marsh position) 2008
- Search Committee Member Vice Marsh Position, Ag Econ & Econ Department, 2008
- Member, Agricultural Economics and Economics Promotion and Tenure Committee for Chris Stoddard, 2007
- Member, Promotion and Tenure Committee for Wendy Stock, 2006
- Supervised graduate student, 2006:
  - Mary Anne Anderson
- Supervisor, Graduate Students, 2005 and 2006:
  - Joel Schumacher
  - Tyler Wiltgen
- Supervise undergraduates for American Indian Probate Reform Act, 2005:
  - Tony Little Owl
  - Tamara Birdsbill
  - Floyd Azure II
- Agricultural Economics and Economics Advisory Committee, 2002-2003.

MSU Extension

- Committee Chair, MSU Extension Housing and Environmental Health Specialist, November 2014-June 2015)

- Missoula County Family and Consumer Science Agent Screening Committee Member, 2008.
- Agricultural Marketing Search Committee Member, 2000.
- Promotion and Tenure Review Committee for Extension Faculty, Department of Political Science, College of Letters and Sciences, Search Committee, 2000.

Collaboration Organizations

(Cooperated with in the development and review Extension materials)

- Montana Attorney General's office (End-of-Life Registry), 2008-2017
- Montana's State Auditor, Office of the Commissioner of Securities and Insurance, 2010-2017
- Department of Public Health and Human Services, Senior and Long Term Care Division, 2010-2017
- Department of Public Health and Human Services (DPHHS); Office of Public Assistance, 2010-2017
- Department of Public Health & Human Services, EMS and Trauma Section, 2010-2014
- Montana Department of Justice, Office of Consumer Protection, 2010-2017
- Montana Department of Revenue, 1998 - 2017
- Montana Legal Services, 1993 - 2017
- State Bar of Montana
  - Elderly Assistance Committee, 2010 - 2014
  - Business, Estates, Trusts, Tax and Real Property Law Section, 1980 - 2017
  - Health Care Law Section, 2010 - 2011
- Montana Board of Medical Examiners, 2010-2011
- Montana State University, College of Nursing, 2010-2011
- Association of Montana Health Care Providers, 2010-2011
- Montana Nurses Association, 2010-2011
- Community & Outreach Partnership Program, Risk Management Agency (AIPRA Fact Sheets), 2008
- Washington State University Western Center for Risk Management Education (Dying Without a Will), 2008
- Montana Credit Unions for Community Development (Get Smart About Money Financial Packets), 2008
- First Interstate BancSystem Foundation (Get Smart About Money Financial Packets), 2008
- Bureau of Indian Affairs Administrative Law Judges, 2007-2010
- Indian Land Tenure Foundation, 2007-2010
- Indian Land Working Group, 2007-2010
- Washington State University Western Center for Risk Management Education, 2007-2010

PROFESSIONAL DEVELOPMENT (Since 2005)

Certification Hours

- Completed annually 30 hours Certified Financial Planning (CFP) (Requirement for Continued Licensing, 1985 - present
- Completed 75 hours of Professional Development Units (Requirement to maintain Family and Consumer Certification) (3-year cycle), 2010 to present.

Conferences Attended (since 2005)

National

- AFCPE Annual Research & Training Symposium, San Diego, CA, November 2017
- Montana Geriatric Workforce Enhancement Program: Moving Forward What's Next for Dementia Care in Montana, October 31, 2017
- National Extension Association of Family and Consumer Sciences, Annual Meeting, Big Sky, MT, September 2016
- National Extension Association of Family and Consumer Sciences, Annual Meeting, White Sulphur Springs, WV, November 2015
- Association for Financial Counseling and Planning Conference, Bellevue, WA., November 2014
- AFCPE Annual Research & Training Symposium, Greenville South Carolina, November 20-22, 2013
- Association for Financial Counseling and Planning Conference, St. Louis, MO., November 2012
- Association for Financial Counseling and Planning Conference, Jacksonville, FL., November 2011
- Association for Financial Counseling and Planning Educators, Denver, Co, November 2010
- National Risk Management Conference, Reno, NV, March 2009
- National Farm LASTS Conference, Denver, CO, June 2009
- Women in Agriculture Educators Conference, Oklahoma City, OK, April 2008
- National Conference of State Legislatures, New Orleans, LA, July 2008
- American Indian Probate Reform Act & Will Writing, Institute for Indian Estate Planning and Probate, Albuquerque, NM, September 2008
- Association for Financial Counseling and Planning Educators, Earned 13 CFP Continuing Education Units, November 2008
- Estate Planning for Charities, Dome Mountain, May 2006.
- Titling Your Real Property & Personal Property, University of Arizona and MSU, Bozeman, June 2006.
- Estate Planning Beyond Basics, University of Arizona and MSU, Bozeman, June 2006.
- Legal & Financial Aspects of Alzheimer's, Denver, CO, October 2006
- Indian Lands Working Group, Cabazon, CA, October 2006.
- Indian Probate Law Indian Enterprises, San Diego, CA, June 2005.
- Association for Financial Counseling and Planning, Phoenix, AZ Nov. 2005.

State

- 65th Annual University of Montana Tax Institute, November 3-4, 2017
- Getting What Matters, Montana Non-Profit Association, October 6, 2016
- Montana Health Care Power of Attorney, State Bar of Montana, October 6, 2016
- MSU Extension Annual Conference, October 14 – 16, 2016
- 64th Annual University of Montana Tax Institute, October 25-27, 2016
- Montana Gerontology Society Conference, April 13 – 15, 2016.
- MSU Extension Annual Conference, October 20-23, 2015
- 63rd Annual University of Montana Tax Institute, Missoula, October 23-24, 2015
- 62nd Annual University of Montana Tax Institute, Missoula, October 17-18, 2014
- MSU Extension Annual Conference, October 20-23, 2014

- Montana Association for Family and Consumer Sciences, Big Sky, MT, 2014
- 61st Annual University of Montana Tax Institute, Missoula, October 18-19, 2013
- MSU Extension Annual Conference, October 22-24, 2013
- Montana's New Uniform Trust Code CLE Institute State Bar of Montana, Billings, November 8, 2013
- Financial Literacy, Women's Foundation of Montana, Chico Hot Springs, April 29, 2012
- Graying in Montana, Wheeler Center, Helena, September 10-11, 2012
- 60th Annual Tax Institute, University of Montana-School of Law, Missoula, October 26-27, 2012
- MSU Extension Annual Conference, MSU-Bozeman, October 29-31, 2012
- Discrimination and Harassment Training, Web-based, 2011
- 59th Annual Tax Institute, University of Montana School of Law, Missoula, October 2011
- Estate Administrative Procedures, National Business Institute, State Bar of Montana, Great Falls, March 2010
- Elder Law, State Bar of Montana, Helena, March 2010
- Montana Legal Issues, The Seminar Group, Billings, August 2010
- 58th Annual Tax Institute, University of Montana School of Law, Missoula, October 2010
- University of Montana, School of Law, Tax Institute, Missoula, MT, October 2009
- Montana Financial Education Coalition, Focusing on Financial Literacy, January 2008
- The Complete Trust Course, Billings, MT, Earned 7 CFP Continuing Education Units, January 2008
- Montana Gerontology Society Annual Conference, Bozeman, April 2008
- Governor's Conference on Aging, Helena, May 2008
- Great Northern Ag Conference, Plentywood, October 2008
- Governor's Conference on Aging, Helena, May 2007
- Montana Financial Education Coalition Conference: Saving Our Future Depends on It, Billings, April 2007
- Estate Planning for the Next Generation, Montana Department of Agriculture, Helena, January 2006.
- National Conference of State Legislatures, Helena, January 2006.
- Estate Planning for the Next Generation Video Conference, 13 Montana Towns, March 2006.
- Financial Laws Affecting Montanans, Montana Association of Family & Consumer Sciences, Bozeman, April 2006.
- Annual Tax Institute School of Law, University of Montana, October 2005
- Medicare Part D and Big Sky Rx Training, AARP, Bozeman, MT, November 2005
- Money Smart Training, Federal Deposit Insurance Corporation, Helena, MT, November 2005
- Financial Education Building Montana Communities, Montana Financial Education Coalition Conference, November 2005.