



Please consider a gift  
to Montana's 3,600+ Special  
Olympics Athletes. For further  
information, contact Terri  
at 406.315.4199 or  
tsappington@somt.org  
Thank you!

## Did you know?

- The VISION of SOMT is an INCLUSIVE WORLD FOR ALL, driven by the power of sport, through which people with intellectual disabilities live active, healthy, and fulfilling lives.



Patrick Yerman, Lewistown Athlete

### A Message from Betsy on behalf of all Montana Athletes

Friends and fans, we need you! Please give your support to me and my fellow Athletes and the sports, education, and health programs that are so important to us.

Thank you so, so much for making such a difference through your kindness and generosity. People like you help us to share our talents and abilities with the world... you bring us joy and you help us to shine!

Finally, thank you for being so loving and giving. YOU are OUR hero.



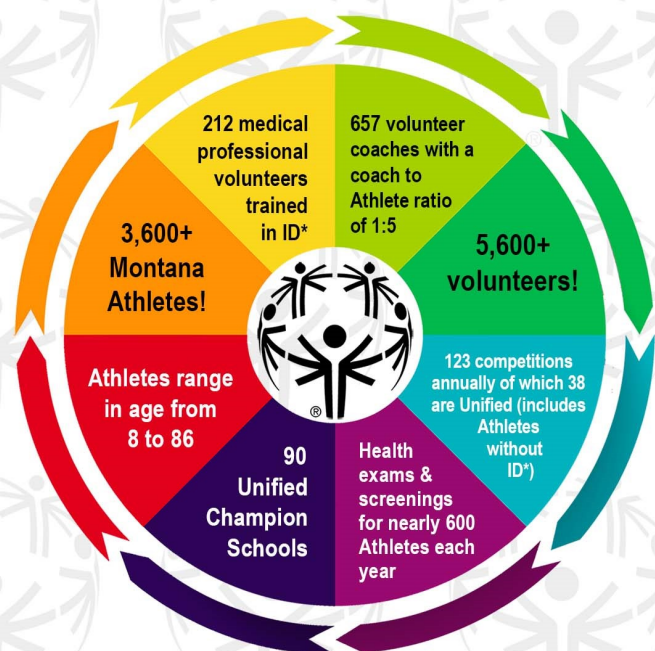
Betsy Schaffer  
Great Falls Athlete  
2020 SOMT  
Athlete of the Year  
&  
2021 Spirit of Montana  
Award Recipient

- We provide our Athletes with health screenings and exams; often times, these are the ONLY form of health-care many Athletes receive. Approximately 600 Athletes will receive a health screening and/or physical exam with our programming, conducted by more than 200 medical professionals and students who volunteer their time!
- We are an Athlete-centered, family-based, volunteer-driven, and sponsor-supported movement with more than 3,600 Athletes registered in 121 programs from 65 Montana communities. Our Athletes find joy, confidence, and fulfillment on the playing field... and in life!



Jalee Foley, Butte Athlete

- Approximately 500 Montana volunteer Law Enforcement Officers and Athletes carry the SOMT torch, THE FLAME OF HOPE, more than 2,200 miles every year in support of Special Olympics Montana!



\*Intellectual Disabilities

# FIRM NEWS

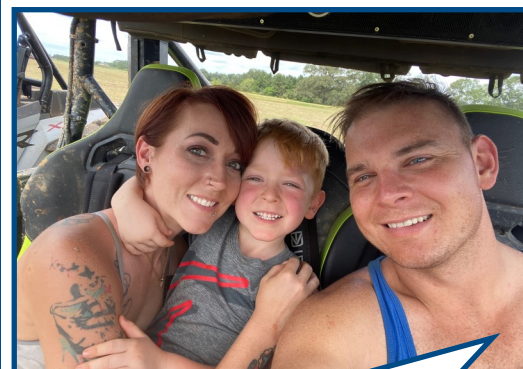


The Crossland Summer was a busy one. Professional Bull Riding came to Great Falls and Holden had his first experience. He's already planning for next year! Braxton and Mazie have taken on a new chore – doing the laundry. It's a challenge for Braxton to get "into" the washer and hand the laundry to his sister, but they have a system. Buck, our new foal, and Jazz, our yearling, continue working through preschool and kindergarten. Both are progressing well!



The Howells travelled back to Montana for Danica's mom's wedding in the mountains. They spent much needed time with their nieces and nephews.

The McCarty family had a very nice summer, including a trip with their daughter to visit their son in San Diego and Jon and Rhonda attending a concert in Missoula. Jon also had a busy summer of biking, logging 800 miles, including a 50 mile ride from Missoula to Hamilton.



The Squires' spent the Labor Day weekend camping, swimming, and ATV riding. Theo has started Kindergarten and is doing great; he loves going to school. Charlene continues to work on her Yoga Teacher Certification and is only 2 assignments away from completion! The Fall should be a more relaxing season for them, with less traveling and more weekends at home.

This summer, Lauren enjoyed time with family and friends at Flathead Lake, Bozeman, and the Smith River. She's looking forward to her wedding in October and cheering on the MSU Bobcats this fall.



Keith spent the summer camping with Hannah, visiting the South of France with Becky, and travelling to Washington DC and Boson.

Scott, Tokerud & McCarty, P.C.  
Attorneys and Counselors



Tressia and Matt explored the Missouri River as much as they could before kayak season ended. They spent every weekend enjoying the Montana water and Big Sky views.





# Farewell LaTonya!

We are sad to see you go but wish you  
the best of luck in your future endeavors.



## A Note From LaTonya

I could never express all my gratitude for the opportunities and knowledge I've gained in the last four years working with this team. Jon's and Keith's tenacity of purpose and outstanding leadership have inspired me. Truly, I have been blessed to have known and worked for such exemplary mentors. I will never forget the experience I gained here in Great Falls, it will absolutely have a positive impact on my professional career and has already changed me into a better person. Even though I was freezing cold most days, I was always surrounded by the warmth of the people I worked with.

I really can't thank y'all enough! I will remain forever GRATEFUL!

*LaTonya Elliott*

# THE LEGACY INSIDER



## A FAMILY MEETING CAN PLAY A KEY ROLE IN YOUR ESTATE PLANNING

Written by: Jon S. McCarty

Our office stresses to our clients the importance of their communicating their estate plan to their family. Holding a family meeting or family summit is a good way to do this. We feel so strongly that a family meeting plays a key role in ensuring an effective estate plan that we have incorporated it into our Peace of Mind Protector process we have in place for revocable living trust-based planning. Of course, a family meeting's role is not limited to just trust-based planning. It can play a key role in any plan you have in place. The goal is to communicate and interact with family so that your plan is explained and misunderstandings and confusion are prevented.

Having said that, discussing your estate plan with your family can sometimes be difficult. Parents can be reluctant to share their plans with adult children. Some parents may be afraid of creating family rifts, for example, if one child is selected to be trustee, personal representative or agent under a power of attorney over the others, or if inheritances are not equal. However, explaining your decisions now to your family will typically avoid surprises later and make it more likely that your family will accept them.

### HERE ARE SOME TIPS FOR A SUCCESSFUL FAMILY MEETING:

- Choose a date and time that is convenient for everyone and select an appropriate location (such as our office if we are hosting the meeting as part of our trust-based services). While in-person attendance is most desirable, don't let the inability of a family member to be there in person derail the

process. Telephone conferencing and Zoom are fine alternatives.

- Have an agenda in place. Open discussion is important, but an agenda will help keep the meeting on track. The agenda should cover your general objectives, purposes, plans and expected outcomes. No detailed financial information or values of assets need be disclosed at this time, unless you feel it appropriate to do so.
- Expect some anxiety at the beginning of the meeting if there are sensitive issues to cover. There may be additional challenges if you have a blended family. Or there may be a child that you do not feel is ready to handle an inheritance. Putting these issues out in the open often leads to greater understanding and acceptance.

And, of course, we can be there to help you explain how your plan works and why key decisions were made.

We have seen firsthand what can happen when the plan is not communicated to and discussed with family. This has included a contested probate that pitted the two surviving sons against each other and multiple years of estate administration and litigation, all a great cost financially and emotionally. This fracturing of family relationships, we are convinced, could have been avoided if he father, before he died, had discussed his plan with his sons and his decisions behind his plan.

So why have a family meeting? It is just good planning in our experience.