

(cont. from p1) possible plan in place and to ensure every contingency is covered from every angle. If you needed a team (an accountant, financial advisor, and attorney) to build your plan, your trustee will need a team to execute that plan. Within the terms of your trust, you can require that your trustee consult with specific designated advisors or professional firms before making important decisions for your trust.

Your attorney has all the legal knowledge to prepare all the documentation needed to transfer your assets

and can advise your trustee on how to deal with certain situations, your accountant can prepare tax forms and assist with estate tax strategy, and your financial advisor can assist with investments and distribution of funds to your heirs or trusts created for your heirs.

Ultimately, appointing specific Trustee Advisors will empower your Trustee to seek advice and guidance from the same professionals you worked with and will ensure that they execute your plan in the best way possible.

In 2021, we're making waffles!

Belgian Waffle Recipe: Courtesy of Brock (Danica's husband)

Ingredients

- ▣ 3/4 cup all-purpose flour
- ▣ 1/4 cup cornstarch
- ▣ 1/2 teaspoon salt
- ▣ 1/2 teaspoon ground cinnamon
- ▣ 1/8 teaspoon ground nutmeg
- ▣ 1/2 teaspoon baking powder
- ▣ 1/4 teaspoon baking soda
- ▣ 3/4 cup buttermilk
- ▣ 1/4 cup milk
- ▣ 6 tablespoons vegetable oil
- ▣ 1 large egg separated
- ▣ 1 tablespoon sugar
- ▣ 1/2 teaspoon vanilla extract

Instructions

1. Pre-heat the oven to 200°F and turn on your waffle iron.
2. Mix flour, cornstarch, salt, cinnamon, nutmeg, baking powder, and baking soda in a bowl. In a separate measuring cup, mix together the buttermilk, milk, and vegetable oil, then in the egg yolk. Set aside.
3. Beat the egg white to soft peaks, sprinkling in the sugar as you go until the peaks are firm and glossy, then beat in the vanilla.
4. Pour the buttermilk mixture into the dry ingredients and whisk until just mixed. Fold the whipped egg white onto the batter in dollops.
5. Pour the batter onto the hot waffle iron and cook until crisp and brown. Set cooked waffles in the oven to keep warm.
6. Repeat with the remaining batter, holding the waffles in the oven until finished. Once all the waffles are cooked, serve immediately.

Have you heard about our YouTube Channel?



SCAN to be taken to our professional interviews playlist.

FIRM NEWS

Christmas, or the day after Christmas, was very exciting at the Crossland house. We had Braxton, Maizie and Clive (and their mom and dad) to share in the fun. Lots of presents, food and Braxton, who's now 5, profoundly telling us all that Santa is NOT real. He says that the "reason for the season is Jesus' birthday." Happy new year from the Crosslands.



FIRM NEWS



Jon and Rhonda recently visited their son Ryan in San Diego. He is adjusting well to his new job and the big city.



LaTonya's daughter, Rosey, is officially 6 months old and starting baby food! Time really does fly.

Danica travelled home (to Montana) for Thanksgiving. While there she taught her nephews and her niece to use a polaroid camera. Wyatt (pictured) had to keep this shot of himself with his "Aunt Nica," so we had to get a picture of a picture to share with you.



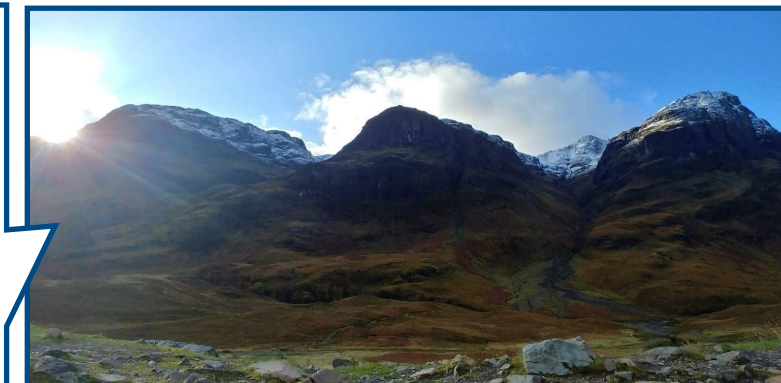
Keith and Becky were both able to hook up with college roommates - it's been a few years! Otherwise, their big excitement was their nightly Facetime call with Hannah.



Caleb, Charlene, and Theo made their way to Missouri to spend the holidays between both sides of their families. Theo was concerned Santa wouldn't know where he was, but he has been re-assured Santa always knows.



This year brings a lot of changes for the Henning family. Just after the New Year, Adair and her sister are heading off to Glasgow Scotland (pictured). Adair will be there for 3 months. She is looking forward to this wonderful opportunity immensely.





WE'RE LOOKING TO ADD ANOTHER VALUABLE TEAM MEMBER!

We will be hiring an estate settlement paralegal/legal assistant in the coming months to support our attorneys in probate and trust administration matters and will be posting an ad soon. If you know anyone whom you believe may be a good fit, please put them in contact with us. We'd love to talk to them!

WE'RE HIRING

2021 Word of the Year



"I plan on living up to our word of the year by re-instituting my physical fitness practices." - Adair

"I am resolved to get outdoors and to exercise; too much time downstairs in the "dungeon" staring at a computer screen!" - Keith

"For our word of the year, "Me", I commit to taking time for exercise, so I can be the best mom and wife I can be." - Charlene

"I have committed to working on mindfulness by meditating on a regular basis." - Danica

"I plan to take time each day to spend time on "Me" things, such as my horses, husband, and family, and live today for today - that's hard when you're a control freak." - Chris

"In fear of sounding cliché, 2021 will be all about weight loss and fitness, so I can get back my body after baby." - LaTonya

"I plan to live up to our word of the year, "Me," by following an exercise program, increasing my biking, and improving my overall health." - Jon

THE LEGACY INSIDER

We are proud to announce our 2021



Charity Partner of the Year

Scott, Tokerud & McCarty strives to choose a Charity Partner whose mission and standards meet our core values.

Special Olympics was launched by Eunice Kennedy Shriver who recognized that something she loved, sports, could serve as a catalyst for connection and community building. She took her love of sports and used it to change the lives of individuals with intellectual disabilities, their families, and their communities.

Scott, Tokerud and McCarty believes in using your gifts, and your work, for a purpose that is far reaching and transformative. And this year, our team is happy to announce our first ever Charity Partner of the Year:

Special Olympics Montana

The mission of Special Olympics is to provide year-round sports training and athletic competition in a va-

riety of Olympic-type sports for children and adults with intellectual disabilities, giving them continuing opportunities to develop physical fitness, demonstrate courage, experience joy and participate in a sharing of gifts, skills and friendship with their families, other Special Olympics athletes and the community.

This year Scott, Tokerud & McCarty has partnered with Special Olympics Montana to further their mission, and we're inviting you to follow our journey.

Keep an eye out, there's more to come!



APPOINTING TRUSTEE ADVISORS



Written By: LaTonya Elliott, Legal Assistant

Who will be the successor trustee of your trust, the one to take over for you when you die or if you become incapacitated? We consistently ask our clients this question when establishing their trusts or making changes to their existing trust. Most people choose someone that they trust like their spouse, children, or trusted family member. Of course, we want you to trust the person you leave in charge, but what we also want our clients to consider when choosing a suc-

cessor is their financial knowledge and ability to understand your estate plan. If the person you trust the most has little to no financial knowledge and cannot seem to grasp your plan, do not despair. There is another mechanism we can add to your trust to keep that trusted friend or family member your trustee.

Like most people, we file our taxes each year with the help of an accountant, strategize with an advisor before making investments, and consult with an attorney before transferring assets. Our office believes in team-based planning. We work with other professionals to make sure you have the best (cont. p2)