

# Montana Estate Lawyers Annual Holiday Newsletter

As 2025 comes to an end, it is always a time for reflection and gratitude.

This year, we are grateful for our Charity Partner of the Year, Big Brothers Big Sisters. Their mission to serve our community through mentorship.

We are grateful to our attorneys, Keith, Jon, and Trevor, for always leading by example and showing us what it means to provide Peace of Mind to our clients and their families.

We are grateful for our staff, Chris, Charlene, Sam, Jeanne, Chafaye, and Henry for always being team players and supporting the office in any way they can.

And, of course, we are grateful for our clients and their families. We cannot express how honored we feel that you trust us with one of your most precious possessions – your legacy.

You don't have to share it with anyone, but just by writing down what you are grateful for can really give a new perspective, so take a few minutes to jot down just three things you are grateful for over the past year. And possibly, what you are looking forward to in 2026.

Our 2025 word of the year was thoughtful. We took time as a staff to really focus on what being thoughtful meant to us. We are passionate about being thoughtful in our work, in our homes, and during the holiday season.

What being *thoughtful* means to us:

Jon—"I want to be deliberate about who I am and how I act."

Keith—"Understanding what others are saying without judgment."

Trevor—"Acting with intention and attention."

Charlene—"Taking yourself out of the equation and focusing on how things impact others."

Sam—"Doing with intention; at work, at home, and with relationships."

Chris—"Getting to know our clients, their needs, and welcoming them to our MEL family."

Jeanne—"Being considerate and aware of your surroundings."

Chafaye—"Thinking of others, being aware of their feelings and needs, and supporting them."

Henry- "Showing consideration for others."

What does thoughtful mean to you?

How can you be more thoughtful in 2026?

We are excited to announce our 2026 Word of the Year in January's edition of the Legacy Insider.

# Montana Estate Lawyers, P.C.

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## Montana Estate Lawyers Holiday Cheer



This is a photo from the 2024 holiday party! We are grateful to continue providing the highest level of care to all our clients with this incredible team going into 2026.

From our team to your family—Happy Holidays!

While our team going into 2026 remains, there have been a few changes in roles at our firm. Below is an update on our team!



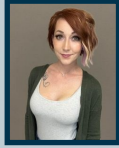
Keith remains focused on farm and ranch based planning. He looks forward to helping those in his community protect their legacy through Estate Planning.



Jon continues to focus on general Estate Planning, Special Needs planning, Medicaid Asset Protection planning, and Estate Administration. He has a passion for our clients and the work we do for our community.



Trevor is currently focused on general Estate Planning, Funding Team Director, and is a key member of our Estate Administration team. He has a passion for helping veterans and elderly Montanans.



Charlene is our Operations Manager and Keith's Executive Assistant. Her love for our team and our clients makes her the perfect Operations Manager for our firm.



Sam is our Marketing Director, Peace of Mind Protector Program Coordinator, and Jon's Executive Assistant. Her hidden roles include Director of Fun and Idea Fairy.



Chris is our Client Relations Specialist and Funding Coordinator. She is the first face you see walking into our office and the last "have a great day" after your meeting. Her love for clients shows in every interaction.



Chafaye is a key member of our Estate Administration team and Trevor's Executive Assistant. She enjoys providing the highest level of care to all of our clients.



Henry is our Financial Coordinator. His hidden roles include resident tech whisperer and cat enthusiast.



Jeanne will be taking a personal sabbatical at this time.