



Montana Association of Legal Assistants*Paralegals

2024 ANNUAL MEETING, SEMINAR & SOCIAL

This is a FREE seminar to all active and new members

Friday, March 29, 2024
(Social at 6:00 pm on Thursday, March 28, 2024)

Approved for 5 CLE Credits by NALA

***Application pending with the State Bar**

Location:
Fairmont Hot Springs Resort
1500 Fairmont Road
Fairmont, MT 59711

SCHEDULE OF EVENTS

Thursday, March 28, 2024

6:00p *Social / Meet-and-Greet with your 2023 Board Members and the Speakers for the Annual Seminar*

Friday, March 29, 2024

8:30 – 9:15a Registration & Breakfast

9:15 – 9:20a *Introductions*
Sabrina Hallsten & Mahkia Clark, Seminar Committee Members

9:20 – 10:20a *Citations*
Emily Bruner | Worden Thane P.C.

10:20 – 10:30a *Break*

10:30 – 11:30a *“Judgment Day is Inevitable”*
Rise of the Machines: AI in The Legal Profession
David Steele | Geiszler Steele, PC

11:30 – 11:45a *NALA Attendee Presentation (by Vicki Kasper)*

11:45 – 1:00p *Annual Meeting & Election of Officers (lunch provided)*

1:00 – 2:00p *Legal Writing*
Dillon Kato | Worden Thane P.C.

2:00 – 2:10p *Break*

2:10 – 3:10p *Notary Refresher and Introducing eApostilles*
Lori Hamm | Secretary of State

3:10 – 3:20p *Break*

3:20 – 4:20p *Low Income Housing Tax Credit Projects*
Kassy Buss and Kelcie Peltomaa | Bjornson Jones Mungas, PLLC

4:20p *Q&A Session / Social*
Sabrina Hallsten, President

SPEAKER BIOS

Emily Bruner – Emily was raised in Whitehall and maintains a strong affection for small towns in Montana. She attended college at the University of Montana, where she converted to an avid Griz fan and earned a degree in journalism. Before attending law school, Emily worked as a reporter for a Missoula news station. As a reporter, she developed strong communication skills while interviewing politicians and police officers, writing stories, and collaborating with news teams across the state. Emily also worked as a media sales manager in Missoula for five years, conducting in-depth consultations with a variety of clients, including local small businesses and national corporations. During law school, Emily interned at Worden Thane, where she worked in a wide variety of practice areas, including litigation, business and commercial law, estate planning, and intellectual property. Emily also completed clinical work at the Rocky Mountain Elk Foundation, assisting in complex property transactions and taxation matters. Emily utilizes her educational and work experience in her practice as an attorney. She understands the importance of active listening and how to effectively communicate complex information, and she is passionate about helping clients solve difficult problems. Emily is thankful she is able to serve the Montana community that has provided her with so much. In her free time, Emily enjoys hiking, fly fishing, skiing, and running with her husband, Eric, and their spirited goldendoodle, Sadie..

David Steele – Dave is a sole practitioner at Geiszler Steele, PC. Dave assists both plaintiffs and defendants in a wide variety of legal matters. Dave has earned a Martindale-Hubbell “AV-Preeminent” rating by his peers, indicating the highest level of professional excellence. His practice includes advising clients about business and commercial matters, including matters involving the cannabis sector, real estate and real property transactions, contract issues, and other civil matters. Dave also serves as a mediator, arbitrator and settlement master. Dave is admitted to practice in all Montana State Courts and all United States District Courts in Montana. He is a member of the State Bar of Montana, the Western Montana Bar Association, and the American Bar Association. Dave is the Immediate Past President of the State Bar of Montana, and a Fellow of the American Bar Foundation. The American Bar Foundation is among the world's leading research institutes for the empirical and interdisciplinary study of law, and which seeks to advance the understanding and improvement of law through research projects on the most pressing issues facing the legal system in the United States and the world. He is a Past President of the Western Montana Bar Association and also served for many years as Justice of the Peace Pro Tem for Missoula County, Montana. Dave was born and raised in Colorado. He received his B.A. in Political Science from Fort Lewis College in Durango, Colorado. He earned his Juris Doctor from the University of Montana School of Law. While attending law school in Missoula, Dave worked as a prosecutor for the Missoula City Attorney's office, and clerked for the Honorable Robert H. Whaley, U.S. District Court Judge, Eastern District of Washington, and for the Honorable Jeremiah C. Lynch, U.S. Magistrate Judge, District of Montana, as a clinical intern. Prior to his legal career, Dave was a professional mountain and river guide, worked as a mountaineering and climbing instructor and ski patroller in Colorado, Utah and California, and as program manager for the Colorado Outward Bound School's international sea kayaking program in Baja California and Sur, Mexico. Dave greatly enjoys spending time outdoors with his friends and family.

Dillon Kato – A Missoula local, Dillon represents clients in estate and trust litigation, employment law, real estate issues, and appeals. After earning a B.A. in Journalism from the University of Montana, Dillon worked for more than five years as a news reporter before returning to UM for law school. His journalism background helps him listen and fully understand a client's concerns, communicate in a straightforward manner, and maintain a precise attention to detail. In his free time, Dillon enjoys cooking, spending time with his family, and traveling.

Lori Hamm – Lori has been with the Montana Secretary of State's office for 19 years and leads the education, outreach, compliance, and administrative functions of the Notary & Certifications Division. She develops the state's live and online notary education programs and produces the (mostly) biennial statewide notary conferences. Recognized nationally as a trailblazer, Lori was an advocate for remote notarization early on, and was instrumental in the enactment and implementation of the 2015 and 2019 remote notarization statutes in Montana. She is the 2021 recipient of the National Notary Association's March Fong Eu award, given to an individual who seeks to improve the standards, professionalism, and effectiveness of the Notary Public office in the United States. She

serves on the Executive Board of the Notary Public Administrator's Section of the National Association of Secretaries of State and is a delegate to the Hague Conference's Forum on Electronic Apostilles.

Kassy Buss – Kassy is a partner at Bjornson Jones Mungas, PLLC. A Montanan since childhood, Kassy has worked in the legal industry since 2008, when she joined Bjornson Law Offices, P.C., as a legal assistant while completing her undergraduate degree at the University of Montana. Kassy also worked with the Missoula firm of Garlington, Lohn & Robinson, PLLP, as a paralegal focused in the areas of business, estate planning, and taxation while attending UM. Following her graduation with high honors from the University of Montana in 2012, she attended the University of Colorado School of Law in Boulder on an academic scholarship, earning her Juris Doctor degree in 2015. During law school, Kassy volunteered for several organizations in her Colorado community, including acting as Secretary for the Colorado Law chapter of the ACLU, serving on the board of the Colorado Women's Bar Association as a law school liaison, and working extensively with the Longmont Community Justice Partnership as a volunteer facilitator in their restorative justice program. In 2015, Kassy returned home to Missoula to continue working with the team at Bjornson Jones Mungas. In addition to working on various aspects of business representation, commercial and real estate transactions, Kassy's practice now includes a significant amount of time working on affordable housing projects, many of which are supported by IRC Section 42 Low Income Housing Tax Credits or receive funds from other state or national financing programs available to LIHTC projects. Kassy's clients have included a myriad of project participants, including nonprofit and for-profit project owners and developers, lenders, housing authorities, consultants, across several states, and with a variety of national and local tax credit investors and syndicators. Kassy also worked with David Bjornson and state legislators on statutory amendments to the Montana Code Annotated related to exemption from property taxes for qualifying affordable housing projects, and she continues to work with other interested parties in advocating for policy changes in this area. In 2023, Kassy was the proud recipient of the GFDA Ally Award from Great Falls Development Alliance in connection with her activities supporting the development of affordable housing projects in the Great Falls Community. Kassy remains actively involved in her community through volunteer service with organizations such as Girl Scouts of America, the YWCA, and Bonner School, and being a current member of the Western Montana Estate Planning Council and the Western Montana Bar Association. In her free time, Kassy enjoys spending time outdoors and with her children and husband.

Kelcie Peltomaa – Kelcie grew up in the suburbs of Denver, Colorado, but moved to Missoula, Montana in 2012 to attend college and be closer to her family and her roots. After graduating with high honors from the University of Montana with a B.A. in sociology and anthropology and a certification in forensic studies in 2016, Kelcie attended the University of Montana School of Law, earning her Juris Doctor in 2019. While attending law school, Kelcie was an active member of the Women's Law Caucus and volunteered for UM's pro bono family law clinic. She also spent time interning with a civil litigation firm in Missoula, as well as the Missoula County Attorney's Office. After graduating from law school, Kelcie practiced in a general civil litigation firm, focused primarily on employment law and contract and property-related disputes, until joining the team at Bjornson Jones Mungas, PLLC in December of 2020. Since transitioning to Bjornson Jones Mungas, PLLC, Kelcie has been involved in a wide variety of simple and complex transactional matters including business formation and planning, real estate and commercial transactions, land use transactions, business sales and acquisitions, homeowners' association formation and development, guardianships and conservatorships, estate planning and business succession planning, probate and trust administration, employment-related contracts, and financing transactions. Additionally, Kelcie has become an integral part of the firm's team working with developers, lenders, project owners, governmental authorities, and consultants throughout many western states on affordable housing projects, including projects involving IRC Section 42 Low Income Housing Tax Credits, state tax credits, governmental grants, RD loan assumptions, and other national, county, and municipal funding sources and programs available to LIHTC projects. Kelcie is the current Program Chair of the Western Montana Estate Planning Council and in her free time coaches AAU volleyball for a local Missoula volleyball club and enjoys spending time with her family.

REGISTRATION

MALA is offering this complimentary seminar and social to its members and any new members who apply for Membership and pay annual dues prior to registering for the annual meeting and seminar.

You may register online at malanet.org

Registration Deadline – Wednesday, March 20

MALA Member: FREE

Student: FREE

Non-Member: \$150.00

If you require registration by mail, please contact MALA at mala@malanet.org

This seminar meets the requirements of the NALA Certifying Board of continuing legal education credit required to maintain the CP (Certified Paralegal) credential.

**event is pending approval by State Bar of Montana*

A block of rooms has been reserved for Thursday and Friday night. Rates are \$189/night.
Reservations can be made by calling 800-332-3272 or online at www.fairmontmontana.com
Group ID: 29115

Reservations must be made by noon on Tuesday, February 27

Interested in speaking to someone about the benefits of membership in MALA?

Email: mala@malanet.org

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www.malanet.org

2023 MALA OFFICERS:

President

Sabrina Hallsten
SHallsten@jmgattorneys.com

Vice President

Mahkia Clark
Mahkia@bjornsonlaw.com

Treasurer

Velvet Truzzolino
Velvet@Hagestaslaw.com

Secretary

Kenzie Heimbach
KHeimbach@jmgattorneys.com

NALA Liaison

Kathy Clark
KLC_Paralegal@msn.com

State Bar Liaison

Sara Godshalk
SaraGo@consumerdirectcare.com

Parliamentarian

Kelli Torbeck
KTorbeck@mcgarveylaw.com