

Succession Planning Workshop Series

January 17th, 2017

February 28th, 2017



Succession planning for farm, ranch and working lands is a valuable practice that provides clarity, direction and accountability to families for land and business transitions. By creating a succession plan, a family's vision and intentions for their land can be addressed and implemented purposefully. Join us for this workshop series to learn more about succession planning and leaving a legacy for your family.

Orientation to Succession Planning

* **Tuesday, January 17th, 2017 9am-Noon**

* Western Oregon University, Werner University Center, Pacific Room, 345 N Monmouth Ave, Monmouth, OR

Tamara Cushing, from OSU Ties to the Land, will present a primer on succession planning, including communication and the emotional aspects of transitioning your land amongst family or other land manager, the very first things to consider in Family Succession Planning.

Succession Planning

* **Tuesday, February 28th, 2017**

* Chemekata Eola Viticulture Center, 215 Doaks Ferry Rd, Salem

* First Session: 9am-Noon

Ron Marek & Alan Lanker, attorneys, will provide an introduction to estate planning strategies, state & federal tax issues, Oregon Natural Resource Credit, structuring ownership & assets, and record keeping. Claire Fiegenger from Greenbelt Land Trust will address Conservation Easements and how they can be used as a tool in estate planning.

* **Lunch Provided with Registration**

* Second Session: 1-4pm

Carl Sohn, with NW Farm Credit Services, will expand on the first workshop and present a more in depth look at family business basics and building a foundation for succession planning focusing on family business topics. Riley Makin, attorney, will provide an introduction to estate planning specifically addressing estate planning issues for farm and ranch landowners.

Design Your Succession Plan

- Transition
- Farming
- Agriculture
- Ranching
- Forestry
- Family
- Business
- Estate
- Retirement

Cost for full Series:

*\$50 per family
(up to 5 people)

*Attend all events for this cost, or choose ones you prefer to attend

*Cost includes Planning Workbook and food

*Register before Dec. 24 to guarantee an orientation workbook is available for you

To Register go to:
www.polkswcd.com

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