

Friday, July 19, 2024 • 9 a.m. - Noon

- Virtual webcast, registration required
- CLE credits being sought

CLICK HERE
to register by
Wednesday, July 17.

YOU'RE INVITED TO ATTEND

ESTATE

&

**SUCCESSION
PLANNING**

FOR THE

FAMILY

FARM

AGENDA:



Farm Succession Planning – The Basics _____ **9 - 10 a.m.**

Clint Fischer, *Ribstein & Hogan Law Firm, Brookings, SD, Braintrust Ag*

Clint's practice focuses on helping farm families navigate the often daunting process of developing and implementing a farm succession plan. While the plan may be as individualized as each farm family, certain guidelines and strategies can be implemented to assist in the process. Clint will help attendees begin the process of family communication, determining family goals and aspirations, and assembling a team to assist in the process.



Hot Topics in Farm Estate Planning _____ **10 - 11:30 a.m.**

Dan Gordon, *Gordon & Associates P.C.*

Indiana farm families face numerous challenges that impact their operation and ability to convey it to the next generation. Tools to assist families engaged in estate/succession planning continue to evolve. Dan will highlight key considerations that may influence the planning process. Dan will use his years of experience representing farm families to address these important issues.



Protecting Your Family's Inheritance from Long-Term Care Costs

Michelle Adler, *Gordon & Associates P.C.*

Michelle will discuss ways that farm families can insulate farm assets against long-term care costs, usually nursing home expenses. With proper foresight and planning, this common dilemma can be managed. Michelle regularly practices in this area and will provide an overview of strategies to address this important task.



Marriage and Protecting Farm Assets _____ **11:30 a.m. - Noon**

Jennifer Hughes, *Church Church Hittle & Antrim*

The subject of premarital agreements is often difficult for families to discuss but can greatly impact the estate/succession plan. Children getting married, or older adults potentially entering a second marriage, could impact the existing farming operation. This form of risk management allows the family to be proactive in dealing with matters that could significantly impact the farming operation, ownership, and valuation. Jennifer will provide an overview of these important issues.