

Tear-off Registration Form

Dates and times for **first** seminar are given—second, follow-up session TBA in Spring). Please check your location:

- Eugene, January 15, OSU Extension Office, 950 W 13th Ave.
- Baker City, January 23, The Sunridge at One Sunridge Lane
- Prineville, January 24, OSU Extension Office, 498 SE Lynn Blvd.
- Klamath Falls, January 29, Klamath Basin Research & Extension Ctr, 3328 Vandenberg Rd.
- Burns/Hines, January 30, Burns District BLM Office, 28910 Hwy 20 West, Hines, OR

Name _____

Address _____

City, State, Zip _____

Phone No: _____

(For meal planning) Number of family members or associates attending: _____

Registrations assist with room set-up and meal planning. Since variable numbers of people may attend per ranch, meal costs will be charged per-person at the door.

Return Registrations with \$50 check (**only one fee per ranch**), made out to OSU Extension Service, to:

Bart Eleveld
Agricultural & Resource Economics Dept.
213 Ballard Extension Hall
Corvallis, OR 97331-3601

Please return registrations by one week prior to the event !!

What does the future hold?

Livestock producers! What would happen to your ranch and estate if you died in a car wreck tonight? Would it survive as a working ranch for your heirs, or would it be carved up for taxes and legal fees?

Got your attention? That was the point! It can happen at any age. We all hope to die peacefully of old age, living to see the ranch passed down to the next generation or two. Are you feeling lucky?

Everyone already has the default, government-dictated, succession plan “A” in place—roughly 40% to taxes and the other 60% to be divided among attorney fees, probate processes, heirs, etc. **What the ranch needs in order to continue being productive, or even exist, is not considered.** This all too often also causes unnecessary heartache and conflict for those left behind.

There is a better way! A good succession plan anticipates future events, assuring the family’s goals for the ranch are achieved. “Failing to plan is planning to fail.” That’s really true with ranch succession.

What better Christmas gift could you give your family than a clearly written succession plan that insures an orderly and successful transition, no matter the future, unpredictable life events?

Ties to the Land Succession Planning for Ranching Families



Workshops presented by:



Funded by a partnership agreement with:



What's in the first workshop?

- Do you need to have a succession plan? What happens if you don't!
 - What do you want the future of your legacy to be?
 - What's important to each generation?
 - What needs to be passed on?
- Family communication. How to organize and conduct family meetings.
- An introduction to institutional constraints and opportunities.
 - Rules, laws and taxes.
 - Ownership structures.
- Team building for a positive succession outcome.
 - Choosing your professional partners.
 - What are their roles and what will it cost?
- How to get started.
 - What can you do right away?
 - Forming an action plan.
- You will be given specific steps to get started!

What's in the next workshop?

- More specific and detailed options from:
 - Attorney
 - CPA
 - Investment advisor
 - Land trust specialist
 - Ranch management advisor
- Review progress on action plan
 - Ask the experts

Please, attend with as many interested family members as possible—only one registration fee per ranch! Only lunch will be charged per person.

Who are the speakers?

- Clint Bentz, CPA with Boldt, Carlisle & Smith. Estate planning expert and co-author of "Ties to the Land: Your Family Forestry Heritage,"
- Doug Sippel and Steve Hopkins, financial advisors with Titan Financial Associates. Have coached many agricultural businesses through the succession planning process.
- Harold Weight, financial planning consultant with Multiplan Financial Services. Has worked extensively with ranching families. Associate Council Chairman of the Oregon Cattlemen's Association.
- Robin Klemm, Interim Executive Director of the Austin Family Business Program at OSU, holds A.E. Coleman Chair in Family Business. Formerly owner of a business consulting firm and faculty member of Wharton School of Economics.
- Marsha Murray-Lusby, attorney and head of estate planning and succession team with Dunn Carney Allen Higgins & Tongue, LLP.
- Bart Eleveld, Extension Farm and Ranch Management Specialist with OSU Extension Service. Organizer and presenter of workshops on risk management and strategic business planning for farms and ranches.
- Frank J. O'Leary, Executive Director of Oregon Rangeland Trust

Questions about workshops?

Contact:

Bart Eleveld, OSU Extension, workshop coordinator
541-737-1409

Bart.eleveld@oregonstate.edu

The OSU county Extension office or the Extension livestock agent at one of the five workshop sites:

Eugene/Lane County: 541-682-4243

Shelby Filley (Douglas County)

541-672-4461

Shelby.filley@oregonstate.edu

Baker City/County: 541-523-6418

Cory Parsons

Cory.parsons@oregonstate.edu

Prineville/Crook County: 541-447-6228

Barbi Riggs

Barbi.riggs@oregonstate.edu

Klamath Falls/County: 541-883-7131

Willie Riggs

Willie.riggs@oregonstate.edu

Burns-Hines/Harney County: 541-573-2506

Dustin Johnson

Dustin.johnson@oregonstate.edu

Oregon Cattlemen's Association: 503-361-8941

Kay Teisl

kayteisl@orcattle.com

Yes, you can attend if you live in a nearby county or even state. Examples will be livestock oriented but you don't have to be a livestock producer to attend (farmers and woodland owners welcome too).