



## **Estate & Succession Planning for the Family Farm**

### **AGENDA**

July 21, 2022  
9 a.m. - 12:00 p.m.  
*Virtual Webcast*

### **REGISTRATION IS REQUIRED**

#### **9 - 10 a.m.**

**What's new in planning to protect your farm from nursing homes and death taxes?**  
**Dan Gordon, Partner, *Gordon & Associates, P.C.***

How does it change your plan if your farm is worth 30% more than it was 2 years ago? Dan will talk about ways that farm families can insulate farm assets against long-term care expenses while still having a workable succession plan. Also, Dan will highlight select estate planning considerations specific to agricultural operations and farm families.

#### **10 - 11 a.m.**

**Leveraging Insurance Products in the Succession Plan**  
**John Selky, Life Market and Product Consultant, *Indiana Farm Bureau Insurance***

In his role with Indiana Farm Bureau, John has had the opportunity to work with many farm families and businesses as they contemplate estate and succession planning. John will highlight his experiences assisting clients and strategies to achieve the desired outcomes. Planning and communication are crucial. John will discuss and share various concepts available that assist in the overall process of estate succession.

#### **11 a.m. – 12 p.m.**

**Generational Transfer of Leadership and Ownership**  
**Davon Cook, Partner, *K•COE ISOM***

Succession is an ongoing process, not a one-time event complete when you sign the estate documents. Davon Cook will discuss processes and behaviors you can use to plan for it and keep everyone on the same page as it plays out. Being proactive about planning for transitions is a valuable gift to your business and your family!