

Thursday, July 20, 2023

9 a.m. - 12:15 p.m.

- Virtual via webcast, registration required
- Attendees receive **3.3 CLE credits**

CLICK HERE
to register by
Tuesday, July 18.

JOIN US FOR THE **10TH ANNUAL**

ESTATE

&

**SUCCESSION
PLANNING**

FOR THE

FAMILY

FARM

SYNOPSIS OF SESSIONS:



Estate Planning 101

9 - 10 a.m.

John Colin, attorney, *Simpson Colin LLC*

John is in the private practice of law and represents many Indiana farm families. He will discuss the legal tools necessary to build and implement an estate and succession plan and key issues related to agricultural enterprises. John also will highlight issues related to the competency of individuals creating the estate plan and the potential undue influence of those benefiting from the plan.



Four Ways to Lose the Family Farm

10 - 11 a.m.

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

Indiana farmers face numerous challenges that impact their operation and ability to convey it to the next generation. Dan will highlight legal options to avoid the pitfalls of estate taxes, nursing care, family disputes and liability creditors. Dan will use his years of experience representing farm families to address these important issues.



Bringing the Next Generation into the Farming Operation 11 a.m. - 12 p.m.

Matt Folz, partner, *Dobbs & Folz, LLC*

How to bring the next generation into farming is a huge part of succession planning, in addition to the "who gets what when you die" issues. Matt will discuss how to make succession planning more manageable, and how to coordinate transitions of operations. Matt also will discuss ways to get your house in order by getting organized and taking deliberate steps during the planning process.



Health Plans for the Family Farm

12 - 12:15 p.m.

Steve Allen, manager, *Indiana Farm Bureau Health Plans*

Many farm families do not have access to traditional, employer-provided health plan options. Health plan cost, catastrophic illness, and the ability to bring new family members into the operation all influence the estate and succession plan. Steve will discuss these considerations.