

## Session 1:

When	What	Who
5:30pm	Welcome & Introductions <ul style="list-style-type: none"> <li>• Program Welcome &amp; Legacy Primer (homework review)</li> </ul>	Jason Fisher and Kim Biasiulli
6:00 – 6:30	Dinner	
6:30 – 7:15	Building the Base <ul style="list-style-type: none"> <li>• The Family Forest Resource</li> <li>• A Family Story</li> </ul>	Kim Biasiulli Joel Cathey/Ebonie Alexander
7:15-7:30	Your Family & Woodland Legacy: The Heirloom Scale	Ties DVD - Fisher
8:00pm	Day 1 wrap-up <ul style="list-style-type: none"> <li>• Old McDonald Sold the Farm</li> </ul>	Fisher
8:30pm	DISMISSAL	

## Session 2:

When	What	Who
8:30a.m. – 9:15	Registration and Breakfast- Information perusal (handouts)/Meet and Greet	Southside Team Leaders
9:15 – 10:00	Overview of planning components <ul style="list-style-type: none"> <li>• Ownership organization tools</li> </ul>	Maggy Gregory, Daniel, Medley and Kirby, P.C.
10:00 – 10:30	Planning components continued – Conservation Tools	Kim Biasiulli
10 Min BREAK		
10:45 – 11:30	Tax Implications for Planning Components New Tax Law Implications for Families	John Neal and Kim Priest, Harris, Harvey, Neal & Co., LLP
11:30 – 12:00	Timber Basis Overview	Rick Hamilton, NCSU Emeritus and Mark Megalos, NCSU
12:00 – 12:45	LUNCH	

12:45 – 1:00	Selecting your Professional Advisors	Joe Graves, Graves Family Forest
1:00 – 1:45	Best Preparations and Review of Components with open Q&A  Landowner Case Studies : Equity, Burden and Costs/Savings	Gregory, Neal/Priest
1:45	<b>BREAK</b>	
2:00 – 2:30	Landowner Panel: <ul style="list-style-type: none"> <li>• 3-4 landowners of varied estate planning experience</li> </ul>	Biasiolli, moderator
2:30 – 2:45	Defining Your Legacy	Ebonie Alexander
2:45 – 3:00	Landowner testimonial – “Succession Happens” What would happen to your woodland legacy?	Ties DVD - Fisher
3:00 – 3:30	Story Cards  Evaluation, Challenge & dismiss	Kim Biasiulli and All