

Focusing on Land Transfer to Generation NEXT

Workshop Agenda (subject to change)

August 9-10, 2019 - Farmville



Session 1 – Friday, August 9th

	What	Who
5:30pm	Welcome & introductions <ul style="list-style-type: none"> Program welcome & legacy primer (homework review) 	Jason Fisher & Kim Biasioli
6:00 – 6:30	Dinner and family forest/farm photo sharing	Kim Biasioli
6:30 – 7:15	Building the base <ul style="list-style-type: none"> The family forest resource A family story 	Kim Biasioli Joel Cathey/Ebonie Alexander
7:15-7:30	Your family & woodland legacy: The heirloom scale	Ties to the Land DVD – Jason Fisher
8:00pm	Day 1 wrap-up <ul style="list-style-type: none"> Old McDonald Sold the Farm 	Jason Fisher
8:30pm	DISMISSAL	

Session 2 – August 10th 2019

When	What	Who
8:30a.m. – 9:15	Registration & breakfast Information perusal (handouts)/Meet and greet	Southside Team Leaders
9:15 – 10:00	Overview of planning components <ul style="list-style-type: none"> Ownership organization tools 	Maggy Gregory, Daniel, Medley and Kirby, P.C.
10:00 – 10:30	Planning components continued – Conservation tools	Kim Biasioli
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	

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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	Maggy Gregory, John Neal/ & Kim Priest
1:45	BREAK	
2:00 – 2:30	Landowner panel: <ul style="list-style-type: none">• 3-4 landowners of varied estate planning experience	Kim Biasioli, 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 to the Land DVD – Jason Fisher
3:00 – 3:30	Evaluation, challenge, & dismiss	Kim Biasioli and All