

Focusing on Land Transfer to Generation NEXT

Workshop Agenda (subject to change)

September 27-28, 2019 - Harrisonburg



Session 1 – Friday, September 27

When	What	Who
5:30pm	Welcome & Introductions <ul style="list-style-type: none"> Program welcome & Legacy primer 	Adam Downing
6:00 – 6:30	Dinner and family forest/farm photo sharing	Adam Downing
6:30 – 7:15	Building the Base <ul style="list-style-type: none"> The family forest resource A family story 	Mike Santucci Landowner
7:15-7:30	Your family & woodland legacy: The heirloom scale	Ties to the Land DVD
8:00pm	Day 1 wrap-up: Old McDonald Sold the Farm <ul style="list-style-type: none"> Homework assignment 	Adam Downing
8:30pm	DISMISSAL	

Session 2 – Saturday, September 28

When	What	Who
8:30a.m. – 9:15	Registration & breakfast Information perusal (handouts)/Meet and greet	All
9:15 – 10:00	Overview of planning components <ul style="list-style-type: none"> Ownership organization tools 	Attorney
10:00 – 10:30	Planning components continued – Conservation tools	Mike Santucci
10 Min	BREAK	
10:45 – 11:30	Tax implications for planning components New tax law implications for families	CPA
11:30 – 12:00	Timber basis overview	TBD
12:00 – 12:45	LUNCH	
12:45 – 1:00	Selecting your professional advisors	Jim Ballard
1:00 – 1:45	Best preparations and review of components with Q&A Landowner case studies: Equity, burden, and costs/savings	Attorney & CPA
1:45	BREAK	
2:00 – 2:30	Landowner panel: 3-4 landowners of varied estate planning experience	Adam Downing, 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
3:00 – 3:30	Evaluation, challenge & dismiss	Adam Downing & Mike Santucci

Virginia Cooperative Extension and Virginia Department of Forestry programs and employment are open to all, regardless of age, color, disability, gender, gender identity, gender expression, national origin, political affiliation, race, religion, sexual orientation, genetic information, veteran status, or any other basis protected by law.