

Focusing on Land Transfer to Generation NEXT

Workshop Agenda (subject to change)

December 5-6, Roanoke

Session 1: Thursday, December 5th



Time	Topic	Presenter
12:30	Lunch	
1:00	Welcome, housekeeping, introductions	Bill Worrell
1:20	Your Family & Your Woodland Legacy: The Heirloom Scale	Ties to the Land DVD
1:50 20 min 25 min 25 min	Building the Base <ul style="list-style-type: none">• Legacy Planning Primer• The Family Forest Resource• Family Dynamics (communications)	Jennifer Gagnon Andrew Fotinos Kevin Spurlin
3:00	Break	
3:20 10 min 30 min 60 min	Preparing for Planning <ul style="list-style-type: none">• Cautionary Tales• The Role of Insurance• Best Practices & Essential Documents	Ties to the Land DVD Alex White Andrew Fotinos
5:00	<ul style="list-style-type: none">• Old McDonald Sold the Farm• Homework• Next Time	Ties to the Land DVD Jennifer Gagnon
5:30	Dismissal	

Session 2: Friday, December 6th

Time	Topic	Presenter
9:00	Welcome & Recap, Breakfast	Jennifer Gagnon/Bill Worrell
9:10 40 min 20 min 30 min	Professional Advisors <ul style="list-style-type: none"> Legal Tools of Owning & Passing Land Management Plan Financial Tools & Implications 	Erin S. Downs, JKDP Chris Sullivan, DOF Sarah Adams, CPA, CGMA
10:40	Break	
10:55 30 min. 20 min.	<ul style="list-style-type: none"> Conservation Options Choosing Your Professional Advisors 	VOF/NRLT/TNC Andrew Fotinos
11:45 30 min.	Professional Advisor Q & A	All professional advisors
12:15	Lunch	
1:00 15 min ea.	Landowner Panel: In Their Own Words <ul style="list-style-type: none"> Landowner 1 - LLC Landowner 2 - Easement Landowner 3 - Negative experience Landowner 4 - Evening things out among kids 	
2:00 15min.	Landowner Panel Q&A	All landowner panelists
2:15	Break	
2:30 30 min.	Attorney Perspective/CPA Perspective	Erin S. Downs & Sarah Adams
3:00	Open Floor for Q & A	All professional advisors/Landowner panelists
3:30 20 min.	Resources	Jennifer Gagnon

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3:50	Landowner testimonial – “Succession Happens”. What would happen to your woodland legacy?	Ties to the Land DVD
4:00	Wrap up & Dismissal	Jennifer Gagnon, Andrew Fotinos, Bill Worrell