



Focusing on Land Transfer to Generation NEXT

**Old Dominion Agricultural Complex
19783 US-29 S Chatham, VA 24531
October 20 - 21, 2023**

Session 1: Friday October 20		
Time	Topic	Speaker(s)
5:30 – 6:00 PM	<ul style="list-style-type: none"> • Registration • Welcome & introductions • Distribute legacy workbooks • The family forest • Sponsor recognition 	Southside Team and Karen Snape, Gen NEXT Coordinator
6:00 – 6:30	Dinner (Photo Story sharing)	
6:30 – 7:30	Step 1: Begin the Process <ul style="list-style-type: none"> • Legacy primer presentation • A family succession story 	Jason Fisher Ebonie Alexander
7:30 – 7:40	BREAK	
7:40 – 8:00	Your woodland legacy: The heirloom scale	Jason Fisher
8:05 – 8:15	Day 1 wrap-up	Jason Fisher and Karen Snape
	Questions and adjourn	Jason Fisher
Session 2: Saturday, October 21		
Time	Topic	Speaker(s)
9:00	<ul style="list-style-type: none"> • Registration and light breakfast • Information perusal • Meet and greet 	Southside Team
9:15 – 9:30	<ul style="list-style-type: none"> • <i>Cautionary Tales</i> video • Is fair always equal? 	Jason Fisher
9:30 – 10:15	Step 7: Determine the Legal, Financial, and Conservation Tools to Help you Meet Your Goals <ul style="list-style-type: none"> • Legal tools 	Maggy Gregory, Fisk and Gregory, PLC
10:15– 10:45	<ul style="list-style-type: none"> • Conservation tools 	E.C. Myers, Director of Conservation Programs, Conservation Partners, LLC

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10:45	BREAK	
10:55 – 12:15	Financial Tools <ul style="list-style-type: none"> • Tax implications for planning components • New tax law implications for families • Timber basis overview 	John Neal, CPA, Harris, Harvey, Neal & Co., LLP Jonathan V. Wright, CPA Harris, Harvey, Neal & Co. LLP Rick Hamilton, NCSU Emeritus and Mark Megalos, NCSU
12:30 – 1:00	LUNCH	
1:00 – 1:30	Step 5: Gather or Create Essential Documents <ul style="list-style-type: none"> • How to prepare • Question & answer session 	Maggy Gregory, Fisk and Gregory, PLC
1:30 – 1:40	BREAK	
1:40 – 2:15	Landowner panel with family stories:	Moderator- Jason Fisher
2:15 – 2:30	Step 8: Provide Opportunities for your Family to Learn About and Enjoy your Woodlands?? <ul style="list-style-type: none"> • Defining your legacy 	Ebonie Alexander/Jason Fisher
2:30 – 3:00	<ul style="list-style-type: none"> • Advisors forum 	All team members
3:00	<ul style="list-style-type: none"> • Evaluation, challenge, and dismissal 	