

# Focusing on Land Transfer to Generation NEXT

## Short-course agenda

*August 15 & 16, 2025 – Montpelier Station, VA (James Madison's Montpelier)*

### *Friday, August 15*

When	What	Who
5:00	REGISTRATION & SIGN-IN <ul style="list-style-type: none"><li>Enjoy light hors d'oeuvres while getting to know other landowners</li></ul>	
<b>5:30</b>	<b><i>Building the Base</i></b>	
20 min	Welcome & Introductions  Legacy Planning Primer: "What is it"	Adam Downing, VCE
45 min	Working Lands Legacy <ul style="list-style-type: none"><li>Virginia's family forests &amp; farms</li><li>Virginia's family landowners &amp; farmers</li></ul>	Genny H. & Rachel H., DOF & VCE?
<b>6:30</b>	<b><i>Dinner &amp; Landowner Testimonial</i></b>	<b><i>Jim Ballard, Landowner</i></b>
7:30'ish	Conclude day 1 & Homework Assignment	



Day 2 

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**Saturday, August 16**

<b>8:00</b> <i>Continental Breakfast</i>		
<b>8:30</b> <i>Overview of Legacy Planning Components</i>		
10 min	Day 1 Recap & Exercise	Adam Downing
15 min		
45 min	Legal Tools, Ownership Organization & Essential Documents	James P. Seidl, PC
<b>15 min break</b>		
30 min	Financial Tools & Tax Implications	?, CPA E.C. might have ideas
30 min	Conservation Tools	Kim Biasioli, PEC
30 min	Selecting your professional advisors	Sara Hollberg, Landowner
30 min	Expert Panel (CPA, Attorney and Conservation specialist) Q & A	All
<b>12:00</b> <i>Lunch</i> <i>Optional "Get Your Story Straight" Walk - Teagan</i>		
<b>1:30</b> <i>Launching your Legacy Plan</i>		
30 min	"Succession happens". What will happen to your land legacy?	Jennnifer Jones, GROUND™
15 min	High Trust Thinking (for family facilitation)	Rob Pitera, Landowner
45 min	Landowner panel: 3 landowners with varied estate planning experience Robert Bradford, Dave Norford, Rob Pitera	Adam Downing (Moderator)
<b>15 min break</b>		
30 min	Wrap-up Conversation and Exercise	Adam Downing
4:00	Evaluation, challenge/homework & dismiss	

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