



# Generation NEXT Legacy Planning Workshop

**Charley's Waterfront Tavern**  
 201 B Nill Street Farmville, Virginia 23901  
**October 4, 2025**

| <b>Agenda</b>    |  |  |
|------------------|--|--|
| <b>Time</b>      | <b>Topic</b>   | <b>Speaker(s)</b>  |
| 8:30 a.m. – 9:00 | <ul style="list-style-type: none"> <li>Registration</li> <li>Distribute legacy workbooks</li> <li>Welcome &amp; introductions</li> </ul> Enjoy light refreshments  | Jason Fisher and Karen Snape, Gen NEXT Coordinator   |
| 9:00 – 9:30      | <b>Begin the Process</b> <ul style="list-style-type: none"> <li>Legacy primer presentation (20min)</li> <li>A family succession story (20min)               <ul style="list-style-type: none"> <li>Defining your legacy</li> </ul> </li> </ul> | Jason Fisher<br>“A Tree Stand Story”   |
| 9:45 – 10:00     | The <b>heirloom scale</b> activity – Page 40 in the Legacy Planning workbook <ul style="list-style-type: none"> <li><i>Cautionary Tales</i> video “Is fair always equal?”</li> </ul>   | Karen Snape  |
| 10:00 – 10:15    | <b>BREAK</b>   |  |
| 10:15 – 11:00    | <b>Determine the Legal, Financial, and Conservation Tools to Help Meet Your Goals</b><br><br>Legal tools<br><br><b>***Begin writing questions on notecards</b>   | Maggy Gregory, Fisk and Gregory, PLC   |
| 11:00 – 11:30    | <b>Conservation Tools</b> <ul style="list-style-type: none"> <li>Options for Your Land</li> </ul>  | E.C. Myers, Director of Conservation Programs, Conservation Partners, LLC<br><br>Genny Harris, Working Lands Conservation Specialist, VDOF |
| 11:30 – 12:00    | <b>Financial Tools</b> <ul style="list-style-type: none"> <li>Tax implications for legal and conservation tools</li> </ul>   | John Neal, CPA, Harris, Harvey, Neal & Co., LLP  |

Virginia Cooperative Extension is a partnership of Virginia Tech, Virginia State University, the U.S. Department of Agriculture (USDA), and local governments, and is an equal opportunity employer. For the full non-discrimination statement, please visit [ext.vt.edu/accessibility](http://ext.vt.edu/accessibility).



# Generation NEXT Legacy Planning Workshop

**Charley's Waterfront Tavern**  
 201 B Nill Street Farmville, Virginia 23901  
**October 4, 2025**

|                     |   |  |
|---------------------|---|--|
| 12:00 – 12:20       | <ul style="list-style-type: none"> <li>• Timber taxation basis overview</li> </ul> <b>***Write additional questions on notecards</b>  | Jonathan V. Wright, CPA<br>Harris, Harvey, Neal & Co. LLP<br><br>Rick Hamilton, NCSU<br>Emeritus and Mark<br>Megalos, NCSU |
| <b>12:20 – 1:00</b> | <b>LUNCH and recognitions</b>   |  |
| 1:00 – 2:00         | <b>Recap of Planning Components - Best Preparations with open Q&amp;A</b> <ul style="list-style-type: none"> <li>• How to prepare</li> <li>• Question &amp; answer session</li> </ul> | Maggy Gregory, Fisk and<br>Gregory, PLC<br><br>John Neal and Jonathan<br>Wright, CPAs                                      |
| <b>2:00 – 2:10</b>  | <b>BREAK</b>  |  |
| 2:10 – 2:30         | Landowner panel with family legacy stories  | Moderator- Jason Fisher  |
| 2:30 – 2:45         | <b>Provide Opportunities for your Family to Learn About and Enjoy your Woodlands??</b> <ul style="list-style-type: none"> <li>• Defining your legacy</li> </ul>                       | Ebonie Alexander   |
| 2:45 – 3:00         | <ul style="list-style-type: none"> <li>• Evaluation, challenge, and dismissal</li> </ul>  | Karen Snape and team   |



# Generation NEXT Legacy Planning Workshop

**Charley's Waterfront Tavern**  
201 B Nill Street Farmville, Virginia 23901  
**October 4, 2025**

## **Presenter Bios 2024**

### **LILLIAN "EBONIE" ALEXANDER**

Ebonie is the current Executive Director of the Black Family Land Trust, Inc. (BFLT) whose mission is to provide educational, technical and financial services to protect and preserve African-American land ownership in the Piedmont region of North Carolina and Virginia. She has more than 25 years of senior management experience working in leadership positions with nonprofit organizations in the field of land-based community economic development and program design and implementation. She has proven to be particularly effective in building, brokering and managing relationships with and between public and private sector stakeholders at local, state and national levels. Since joining the BFLT in 2009, Ebonie has designed and implemented the BFLT African American Land Ethic and Wealth Retention and Asset Protection (WRAP) programs. Each is a comprehensive intergenerational wealth retention program designed specifically to reduce the rate of African American land loss by educating landowners about strategies to build generational wealth by preserving land ownership. Ebonie has degrees in Public Administration and Nonprofit Management. A proud Virginian who can trace her family's history in the Commonwealth to 1767, she currently resides in Southside Virginia on land that has been in her family for six generations.

### **JOEL CATHEY**

Joel has served as Resource Manager for Ontario Hardwood Co., Inc., since 2000, which is a grade hardwood sawmill that procures wood over a large portion of Virginia and North Carolina. He currently manages approximately 20,000 acres of forestland in Virginia and West Virginia and himself is a forest landowner and Tree Farmer. He obtained a B.S. in Forestry from N.C. State University in 1980. Joel was employed from 1980-2000 by Chesapeake Corporation, St. Laurent Forest Products, and Smurfit-Stone Container with numerous wood procurement and land management responsibilities in Virginia. He has been a member of the Society of American Foresters since 1980. He also is a member of the North Carolina Forestry Association and served on numerous committees including President. He has been a long-time member of Forest Resource Association's Policy and Operations Committee and Past Chairman for FRA's Appalachian Technical Division. Joel has served as instructor for numerous SFI Logger and Landowner Education classes. Joel and his wife own Long Branch Farms in Halifax, VA, of which their daughter and son-in-law are preparing to become Next Generation owners.

### **JASON FISHER**

Jason serves as Central District Senior Extension Agent in the 23-County Region of Virginia Cooperative Extension with 30 years experience. He brings leadership to sustainable forest and natural resources management research and techniques for landowners, loggers, professional foresters, and natural resource educators. Major projects include awareness and implementation of logging safety practices, timber and wildlife management, invasive plant and animal species management, and forestland

Virginia Cooperative Extension is a partnership of Virginia Tech, Virginia State University, the U.S. Department of Agriculture (USDA), and local governments, and is an equal opportunity employer. For the full non-discrimination statement, please visit [ext.vt.edu/accessibility](http://ext.vt.edu/accessibility).



# Generation NEXT Legacy Planning Workshop

**Charley's Waterfront Tavern**  
201 B Nill Street Farmville, Virginia 23901  
**October 4, 2025**

transition. Prior to his work in Extension that began in 1996 in Horticulture and later the 4-H Youth Program, he worked for Huber Engineered Woods. He has a B.S. degree in Forestry and Wildlife Sciences and Masters in Science and Education from Virginia Tech. He is a Fellow of the Virginia Natural Resources Leadership Institute, and a Certified Arborist through the International Society of Arboriculture. Jason lives in Halifax on a 50-acre Tree Farm with his wife Cindy and their two daughters, Libby and Malory who enjoy outdoor recreation on their land and surrounding areas. Jason also enjoys taxidermy, hunting/fishing, and mentoring younger generations in the outdoors.

## **JOE GRAVES**

Joe is Co-Manager with his brother Clark of Graves Family Timberlands LLC. Joe is the landowner representative to our committee and supports efforts with the landowner panel as well as working with a team of experts to help keep land intact, in the family, and in forest. Joe is a retired Naval Reserve Chief Petty Officer, a retired rural mail carrier, and a former Halifax County educator. He became interested in forestry in a Boy Scouts of America summer program. After graduating from the University of North Carolina at Chapel Hill with a degree in education, he and his bride, Sue, settled on a family farm in Halifax County. They began a family and along with his brother started thinking about the future on the farm for their families. After attending a number of Virginia Cooperative Extension training sessions, they settled on forestry as a way to cover costs and provide a long-range financial base for an agriculture and forestry business. Their first pine trees were planted in the mid-1970's. In 2016-2017 they completed their largest timber harvest to date. Their children will be the fourth generation of the Graves family having begun in 1915 to own and care for the land and business.

## **MAGGY L. GREGORY**

Maggy is a partner in the law firm of Fisk & Gregory, PLC, and maintains her primary office in Chatham. She received her undergraduate degree from the University of Virginia in 2005 and her juris doctor from the College of William and Mary in 2010. She practices primarily in the areas of trust, estate and business succession and planning and advising, including high net worth and federally taxable estates and focusing on land owning, multi-generational and closely-held entity challenges. She is a past president of the Pittsylvania County Bar Association and served for six years as the national chair of the American Bar Association's Agriculture Law subcommittee.

## **RICK HAMILTON**

Rick has extensive experience in forest landowner education through a 32-year tenure as Extension Forestry Specialist at NCSU. Rick received a Master's in Forestry from Duke, and BS in Forestry from Lycoming College. Rick is a North Carolina Registered Forester #799. He was recognized as a Fellow by the Society of American Foresters in 2003 and received the Henry Hardtner Award in 2006. Currently retired, Rick offers estate planning and landowner taxation advice as it pertains to timber harvesting and is a colleague of Jason's. He continues to assist NCSU with an annual Working Forestry Summit for landowners.

Virginia Cooperative Extension is a partnership of Virginia Tech, Virginia State University, the U.S. Department of Agriculture (USDA), and local governments, and is an equal opportunity employer. For the full non-discrimination statement, please visit [ext.vt.edu/accessibility](http://ext.vt.edu/accessibility).



# Generation NEXT Legacy Planning Workshop

**Charley's Waterfront Tavern**  
201 B Nill Street Farmville, Virginia 23901  
**October 4, 2025**

## **CHARLES LACY**

Charles Lacy serves the Virginia Department of Forestry as Forestland Conservation Specialist. He is responsible for developing conservation easements in the central, southern, and southwestern portions of the state. Charles has B.A in History from Hampden-Sydney College and is a certified GIS professional. Charles' background includes working for Trout Unlimited, where he helped protect Virginia's cold water resources, and a law firm in Southwest Virginia, where he was responsible for completing large-scale real estate transactions, including conservation easements. Charles is from Wythe County in Southwest Virginia. In his free time, Charles enjoys camping and backpacking with his fiancée, and fly-fishing for wild trout in the high country.

## **ELIZABETH CAROLINE "E.C." MYERS**

E.C. is the Director of Conservation Programs at Conservation Partners, an organization based in Lexington, Virginia, that is dedicated to protecting farms, forests, and open spaces for future generations. Primarily focused on outreach, E.C. leads community engagement to help individuals and organizations understand the vital importance and associated benefits of land and water conservation. E.C. was the fourth generation to be raised in her family home in Charlotte, NC. Because of this, she adores working with landowners to preserve their family legacy and land for the generations to come. E.C. graduated from Washington and Lee University with degrees in Environmental Studies and Business Administration. This is where E.C. found her passion for agriculture-- working on a small dairy farm outside of Lexington. Having fallen in love with the rural landscapes of Virginia and North Carolina, E.C. looks forward to assisting more landowners by helping them protect the land they love—forever.

## **JOHN R. NEAL, CPA**

John is a senior partner with Harris, Harvey, Neal & Co., LLP, Certified Public Accountants and maintains an office in South Boston and Danville, Virginia. He graduated from Virginia Tech in 1984 with a BS in Accounting. In 1989, he obtained his CPA license from the State of Virginia. In December of 1989, he began working for Harris, Harvey, Neal & Co., LLP. His areas of expertise include: income taxation of individuals, corporations, partnerships, LLC's, trusts, and estates. He serves as partner-in-charge on numerous audits, reviews, and compilations for various business entities and non-profit organizations. John is a member of the American Institute of Certified Public Accountants. He is also a member and former director of the Virginia Society of CPAs. Also, he has served as a past president of the Piedmont Chapter of the Virginia Society of CPAs. He currently resides in Pittsylvania County.

## **KAREN SNAPE**

Karen is a Virginia Cooperative Extension Associate working in the areas of logger education and landowner education. She coordinates the day-to-day operation of the SHARP Logger program, which trains loggers in sustainable forestry, safety, and water quality protection. She also serves as the statewide coordinator for the Generation NEXT legacy planning program. Prior to coming to VCE, Karen served as an Area Forester for the Virginia Department of Forestry in the Fredericksburg area. She holds Virginia Cooperative Extension is a partnership of Virginia Tech, Virginia State University, the U.S. Department of Agriculture (USDA), and local governments, and is an equal opportunity employer. For the full non-discrimination statement, please visit [ext.vt.edu/accessibility](http://ext.vt.edu/accessibility).



# Generation NEXT Legacy Planning Workshop

**Charley's Waterfront Tavern**  
201 B Nill Street Farmville, Virginia 23901  
**October 4, 2025**

a Bachelor of Science from Juniata College in Pennsylvania and a Master of Forestry from Duke University.

## **JONATHAN V. WRIGHT, CPA**

Jonathan is a partner with Harris, Harvey, Neal & Co., LLP, Certified Public Accountants and maintains an office in South Boston and Danville, Virginia. He graduated from Lynchburg College in 2009 with a bachelor's degree in Accounting and earned a master's degree in business administration in 2010. In 2011, he obtained his CPA license from the State of Virginia. In July of 2014, he began working for Harris, Harvey, Neal & Co., LLP. His areas of expertise include: income taxation of individuals, corporations, partnerships, LLC's, trusts, and estates. He serves as partner-in-charge on numerous audits, reviews, and compilations for various business entities and non-profit organizations. Jonathan is a member of the American Institute of Certified Public Accountants. He is also a member of the Virginia Society of CPAs. He currently resides in South Boston, Virginia.



# Generation NEXT Legacy Planning Workshop

**Charley's Waterfront Tavern**  
201 B Nill Street Farmville, Virginia 23901  
**October 4, 2025**

## **Presenter Contact Information**

### **LILLIAN "EBONIE" ALEXANDER**

Executive Director  
Black Family Land Trust, Inc.  
307 W. Main Street, PO Box 2087  
Durham, NC 27701-3215  
Office: (919) 683-5263 Ext. 201  
Mobile: (434) 247-9500  
[ebonie@bflt.org](mailto:ebonie@bflt.org)  
<http://www.bflt.org/index.shtml>

### **CHARLES LACY**

Forestland Conservation Specialist  
Virginia Department of Forestry  
90 Forestry Center Lane  
P.O. Box 160  
Crimora, VA 24431  
Phone: (434) 995-8369  
[Charles.lacy@dof.virginia.gov](mailto:Charles.lacy@dof.virginia.gov)

### **E.C. MYERS**

Director of Conservation Programs  
Conservation Partners  
PO Box 152  
4 East Washington St.  
Lexington, VA 24450  
Office Phone: 540-464-1899 Ext. 4  
Mobile: 704-778-2102  
[ecmyers@conservationpartnersllc.com](mailto:ecmyers@conservationpartnersllc.com)

### **JOEL CATHEY**

Resource Manager, Ontario Hardwoods Inc.  
3828 Horseshoe Bend Rd.  
Keysville, VA 23947  
Office: (434) 736-9291  
Mobile: (434) 395-8748  
[joelcathey@hotmail.com](mailto:joelcathey@hotmail.com)

### **JASON FISHER,**

District Extension Agent, Forestry and Natural  
Resources – Central District  
VA Cooperative Extension, Halifax Co. Office  
P.O. Box 757 Halifax, VA 24558-0757  
Office: (434) 476-2147 x3389  
[jasonf@vt.edu](mailto:jasonf@vt.edu)

### **KAREN SNAPE**

Extension Associate and Coordinator of  
Generation NEXT Program  
304B Cheatham Hall, 0324  
Blacksburg, VA 24061  
540-231-6494  
[ksnape@vt.edu](mailto:ksnape@vt.edu)

### **MAGGY GREGORY, ESQ.**

Fisk & Gregory, PLC  
2. N. Main Street  
P. O. Box 59  
Chatham, VA 24531  
Phone: (434) 432-2531  
[maggy@fiskgregorylaw.com](mailto:maggy@fiskgregorylaw.com)

### **RICK HAMILTON**

NC State University Extension Specialist,  
Emeritus  
Timber Taxation  
[ncrf799@gmail.com](mailto:ncrf799@gmail.com)

### **JOHN R. NEAL, CPA**

Senior Partner  
Harris, Harvey, Neal & Co., LLP, CPA's  
P.O. Box 754  
523 Edmunds Street  
South Boston, VA 24592  
Office: (434) 575-7914  
[jrn@hhncpa.com](mailto:jrn@hhncpa.com)

### **JONATHAN V. WRIGHT, CPA**

Harris, Harvey, Neal & Co., LLP  
P.O. Box 754  
523 Edmunds Street  
South Boston, VA 24592  
Office: (434) 575-7914  
Fax: (434) 575-6850  
[jvw@hhncpa.com](mailto:jvw@hhncpa.com)

Virginia Cooperative Extension is a partnership of Virginia Tech, Virginia State University, the U.S. Department of Agriculture (USDA), and local governments, and is an equal opportunity employer. For the full non-discrimination statement, please visit [ext.vt.edu/accessibility](http://ext.vt.edu/accessibility).