

Succession Planning Workshop for Farm and Ranch Families
Passing Down the Family Farm or Ranch



Friday, November 22, 2013
8:30 a.m. – 4:00 p.m.
Anderson Valley Grange
9800 Highway 128, Philo



Agenda

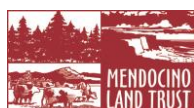
- 8:30 – 9:00 **Registration and Coffee**
- 9:00 – 9:35 **Welcome and Introductions**
- 9:35 – 10:05 **What is Succession Planning and Why Do it?**
Reggie Knox, California Farm Link
- 10:05 – 11:30 **Meet Your Peers**
- Introduction to good communication
 - Peer listening breakout sessions
- Olivia Boyce-Abel, Family Lands Consulting*
- 11:30 – 12:30 **Transferring the Business**
- Retirement planning 101
 - Operations and management transfer: handing over the reins
 - Business structures and valuation: preparing for transfer
- Rod Carter, Northern California Farm Credit Business Consulting*
- 12:30 – 1:30 **Lunch Speaker – Family “Success-ion Story”**
Mac, Kate and Grace Magruder, 4th and 5th generations at Magruder Ranch
- 1:30 – 2:45 **Estate Planning Nuts and Bolts**
- Wills, trusts and other tools: passing down land and other assets
 - Tax demystification: estate taxes, gift taxes, property taxes
 - How a conservation easement could fit the estate plan
- Stephen Johnson, Mannon, King & Johnson*
Michael Delbar, California Rangeland Trust
- 2:45 – 3:30 **Effective Family Meetings**
- Key elements of effective meetings
 - Practical application: planning a family meeting
- Olivia Boyce-Abel, Family Lands Consulting*
- 3:30 – 4:00 **Closing**
- “Homework” for beginning your succession plan
 - Sign-ups for follow-up clinic

This workshop is built on a model developed by California FarmLink with the Center for Land-Based Learning.



A Legacy of Working Lands – Preserving Anderson Valley’s Heritage

This workshop been made possible by a grant from the Community Foundation of Mendocino County and with the assistance from these organizations and businesses.



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