Estate & Family Farm Business Transfer Planning: Individuals, Spouses, Professionals and Family Businesses

March 3, 2011 8:30 a.m. – 3:15 p.m. EST
Purdue Cooperative Extension Service Office - Allen County,
4001 Crescent Ave., Ft. Wayne, IN

This seminar is sponsored by Purdue Cooperative Extension Service – Allen County and the Department of Agricultural Economics Purdue University. Topics discussed are intended for individuals, their spouses, adult children and especially those with interests in family-owned businesses. Professionals who assist others with their estate and financial planning needs are encouraged to register. Five hours of continuing education credit is available for Indiana professionals including: accountants (CPE), lawyers (CLE) and insurance producers (CE).

The presenter is Gerry Harrison, Farm Management Extension Economist and member of the Indiana Bar. Harrison is a professor, Dept. of Agricultural Economics, Purdue University. Dr. Harrison has presented programs on estate and family farm business transfer planning in Indiana for 38 years. Besides research, teaching and writing for Purdue Extension, he has taught three courses at Purdue: Estate and Family Business Transfer Planning, Federal Income Tax and Agricultural Law. You may contact Gerry with a toll free call: 1-888-398-4636; and ask for Ext.44216 or dial directly 765-494-4216; E-mail: <harrisog@purdue.edu>.

8:30 a.m. - Check-in — Coffee and continental breakfast.
8:55 a.m. - 11:30 a.m. Topics: Goals and Objectives —Your Vision? Property Ownership Law and Implications for Estate Planning, With and Without a Will, Avoiding Probate, Medicaid and Long Term Care Insurance, Federal Gift, Estate and Indiana Inheritance Tax.
Lunch
12:15 p.m. - 3:15 p.m. Topics: More on Federal Gift and Estate Taxes Including Special Valuation of Farmland; Choices for Family Business Arrangements; Buy-Sell Agreements; Estate Planning with Living Trusts; Charitable Planning—Income and Gift and Estate Tax Planning plus Conservation Easements.

Materials will be provided. Pre-registration is required.

Purdue University is an equal opportunity/equal access/affirmative action institution.*

Registration Form

Registration is $30 per individual; $75 if for professional continuing education--add $20 for an individual’s second professional certification); $20 for a registered individual's spouse. Adult children are encouraged to attend and register as individuals. Registration includes materials, continental breakfast, lunch and break drinks and snacks.

Make a check payable to: Allen County CES Education Fund. You may register by U.S. Mail or at the Purdue Extension – Allen County Office, Monday.- Friday; 8:00 a.m.- 4:00 p.m. Phone: 260-481-6436

Enclosed $______.

(First)_____________________/ (last) __________________________
Name ($25 fee or $70 if for CE, CLE or CPE credit) Registrant’s Spouse ($15 fee)

____________________________________
Address

____________________________________
City, State, Zip Code

____________________________________
Telephone (Work/Home)

____________________________________
E-mail:

____________________________________
Job or status (✓): _____ Non-Farmer; _____ Farmer;
_____ Landowner; _____ Lawyer; _____ Ins. Agent;
_____ Accountant; _____ Small Business Owner;
_____ Spouse; __________________________
_____ Other; __________________________

Send to: PCES – Allen County Office, 4001 Crescent Ave. Ft. Wayne, IN 46815-4560

*I require auxiliary aids or services because of a disability. Contact host — Gonzalee Martin, Ph: 260-481-6436 Fax: 260-481-6439 E-mail: marting@purdue.edu for special dietary needs contact host by March 1, 2011.