

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

**Tuesday, February 23, 2011; 8:30 a.m. – 3:15 p.m., CST**  
**Gibson County Courthouse South Annex, 800 S Prince St., Room 34, Princeton, IN**



This seminar is sponsored by Purdue Extension – Gibson County and the Department of Agricultural Economics, Purdue University. Co-sponsors include the Gibson County Community Foundation and Rick Watkins Financial Services. 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, 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 business transfer planning for 37 years. Besides research, teaching and writing for Purdue Extension, he has taught three courses at Purdue: Estate 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](mailto:harrisog@purdue.edu)>.

**8:30 a.m. - Check-in — Coffee and continental breakfast provided by Rick Watkins Financial Services.**

**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 Tax and Indiana Inheritance Tax.**

**Lunch Provided by Gibson County Financial Services**

**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.**

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**Registration Form**

**Deadline Feb. 21, 2011!**

Registration is \$30 per individual; \$20 for a registered individual's spouse; \$75 if for professional continuing education--add \$20 for an individual's second professional CE certification. 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: **Gibson County Extension Education Fund**. You may register by U.S. Mail or at the Purdue Extension – Gibson County Office, Monday- Friday; 8:00 a.m.- 4:00 p.m. Phone: 812-385-3491

Enclosed \$ \_\_\_\_\_.

(First) \_\_\_\_\_ / (last) \_\_\_\_\_  
**Name** (\$30 fee or \$75 if for CE, CLE or CPE credit)

\_\_\_\_\_  
 Registrant's Spouse (\$20fee)

\_\_\_\_\_  
**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: PUCES-Gibson County Office, Courthouse Annex South, Room 35, 800 S. Prince St. IN 47670-2664**

\* \_\_\_\_\_ I require auxiliary aids or services because of a disability. Contact Coordinator, Hans Schmitz Ph: 812-385-3491  
 Fax: 812-385-3493; E-mail: [hschmitz@purdue.edu](mailto:hschmitz@purdue.edu) -- For special dietary needs contact host by Feb. 21, 2011.