

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

## Friday, February 25, 2011; 8:30 a.m. – 3:15 p.m., EST

PCES, Johnson County Office, 484 N Morton St., Franklin, IN



This seminar is sponsored by Purdue Extension – Johnson 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, 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.**

**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***

**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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<b>Registration Form</b>		<b><u>Deadline Feb. 23, 2011!</u></b>
<p>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. <b>Registration includes materials, continental breakfast, lunch and break drinks and snacks.</b></p> <p>Make a check payable to: <b>Johnson County Extension Education Fund</b>. You may register by U.S. Mail or at the Purdue Extension –Johnson County Office, Monday- Friday; 8:00 a.m.- 4:00 p.m. Phone:317-736-3724</p> <p>(First) _____ / (last) _____</p> <p><b>Name</b> (\$30 fee or \$75 if for CE, CLE or CPE credit) _____ <i>Registrant's Spouse</i> (\$20 fee) _____</p>		
<p>_____</p> <p style="text-align: center;"><b>Address</b></p> <p>_____</p> <p style="text-align: center;"><b>City, State, Zip Code</b></p> <p>_____</p> <p style="text-align: center;"><b>Telephone (Work/Home)</b></p> <p><b>E-mail:</b> _____</p>	<p><i>Job or status (✓):</i> _____ <i>Non-Farmer;</i> _____ <i>Farmer;</i>          _____ <i>Landowner;</i> _____ <i>Lawyer;</i> _____ <i>Ins. Agent;</i></p> <p>_____ <i>Accountant;</i> _____ <i>Small Business Owner;</i></p> <p>_____ <i>Spouse;</i> _____</p> <p>_____ <i>Other;</i> _____</p>	
<p><b>Send registration to: PCES Johnson Co. Office, 484 N. Morton Street, Franklin, IN 46131</b></p> <p>* _____ I require auxiliary aids or services due to disability. Contact Coordinator, David Smith, Ph: 317-736-3724          Fax 317-738-5760; E-mail: smith47@purdue.edu -- For special dietary needs contact the coordinator by Feb. 23, 2011.</p>		