

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

Tuesday, February 22, 2011; 8:30 a.m. – 3:15 p.m., CST
 Spencer County Fairgrounds, Bldg., 1101 E. St. Rd. 70, Chrisney, IN



This seminar is sponsored by Purdue Extension – Spencer 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>.

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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Registration Form		<u>Deadline Feb. 18, 2011!</u>
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: Spencer County Extension Education Fund . You may register by U.S. Mail or at the Purdue Extension –Spencer County Office, Monday- Friday; 8:00 a.m.- 4:00 p.m. Phone: 812-649-6022		
		Enclosed \$ _____.
(First) _____ / (last) _____ Name (\$30 fee or \$75 if for CE, CLE or CPE credit)		_____ Registrant's Spouse (\$20fee)
_____ <p style="text-align: center;">Address</p> _____ <p style="text-align: center;">City, State, Zip Code</p> _____ <p style="text-align: center;">Telephone (Work/Home)</p> E-mail: _____	Job or status (✓): _____ Non-Farmer; _____ Farmer; _____ Landowner; _____ Lawyer; _____ Ins. Agent; _____ Accountant; _____ Small Business Owner; _____ Spouse; _____ _____ Other; _____	
Send to: PUCES-Spencer County Office, Spencer County Courthouse, Rm. #3, 200 Main Street, Rockport, IN 47635		
* _____ I require auxiliary aids or services because of a disability. Contact Coordinator, Nick Held Ph: 812-649-6022 Fax: 812-649-6040; E-mail: nheld@purdue.edu -- For special dietary needs contact host by Feb. 18, 2011.		