**Managing for Today and Tomorrow: Succession, Business, Estate and Retirement Planning for Farm Women**

A 5 week workshop series for farm women

Jan 26, Feb 9 & 23, Mar 8 & 22 with snowdate Mar 15
10:30 am-2:30 pm

Choose your Location: CCE Broome or Cayuga Counties, LaFayette Christian & Missionary Alliance Church, Lafayette; & Dryden Fire Hall

Cost for all Session: $100
Includes: 15 hours of instruction, meals and course materials.

Annie’s Project is a program designed to empower farmwomen to become better business partners through networks and by managing and organizing critical information.
January 26
Business Planning: Financial Documents
-Joan Petzen, Area Ext. Farm Business Management Specialist, NWNY Dairy, Livestock & Field Crops Team
Prioritizing and Decision Making using Farm Financial Records
-Edie McMahon, bookkeeper, EZ Acres

February 9
Farm Succession Planning: Setting the Stage
-Defining your Vision for the Business
-Setting Goals for Business and Family
-Dan Galusha and Anna Supp, Farm Credit Financial Consultants

Estate Planning 101: Legal documents needed to protect your property and possessions
-Manage estate tax,
-Considerations of Heirs and their inheritance
-Steve Walker, Attorney, Sclaro, Fetter, Grizanti, McGough and King, PC.

February 23
Retirement Planning. What are your Income & Lifestyle Expectations?
-In order to help build the best personal retirement strategy, there are some key considerations.
Things like your estimated retirement income, potential expenses, life expectancy and the state of your healthcare. Only by assessing these factors can you accurately gauge what you will need to ensure a retirement lifestyle you desire.
-Tools will be shared to help you begin the process of ensuring the retirement lifestyle you want.

March 8
Putting together the Framework for Farm Succession:
-Management & Ownership to the Next Generation
-Legal structures and financial strategies: Gifting, Trusts, LLC’s, Profit shares . . .
-Dan Galusha, Farm Credit Financial Consultants

Communication & Conflict Resolution within the Farm Family
-Messages sent & received, Strategies for Conflict Management . . .
-Erica Leubner, MSW, Personal Consultant, Farm Net

March 15
Save for Snow Date
March 22
Putting the Succession Plan into Action: Moving Management & Ownership to the Next Generation
-Dan Galusha, Anna Supp, Steve Walker, Erica Leubner and Extension Site Facilitators

Dan Galusha, farm business consultant, has over 35 years experience with Farm Credit East. His work addresses business structure comparison, farm estate planning, business arrangements, farm family business transfers, and financial management assistance. He has been extensively involved in consulting with clients on issues related to agricultural income taxation, estate planning, gift taxes, generational transfers, business acquisitions and partnership dissolutions. He has experience working with small family farms and large multi-stage agribusinesses.

Anna Supp is a Tax Consultant with Farm Credit East, ACA, specializing in tax planning, estate planning, farm business transfers, and entity formation. She works with a wide variety of agricultural businesses throughout Central New York helping to ensure business continuity and manage tax issues. She is a 2007 graduate of SUNY Cobleskill, a member of LEAD NY Class 16, and Cornell’s Dairy Executive program.

Erica Leubner, MSW combines her love of social work with her love of farming as a personal consultant with Farm Net. Erica likes to help women determine their strengths and find their niche within their agri-business. Erica co-manages a seasonal farm stand and pumpkin patch with her husband, Tim. She manages over 30 employees, seventy acres of pumpkins, a bakery and several agri-tourism activities.

Mark Modzeleksi, CFS, CLTC, is a Financial Services Representative. Mark’s focus has been directed toward financial and estate planning, as well as private wealth management. Mark combines his industry knowledge and passions to his life-long interest in agriculture. He focuses on planning for individuals and small business in the areas of retirement planning, wealth accumulation, risk management and wealth transfer. His main areas of expertise lie in business transfer, succession and continuity planning along with qualified and non-qualified plan development.

Steve Walker. His statewide practice focuses on business, estate, tax succession and transactional planning for closely-held and family-owned enterprises, particularly those involved in agriculture. Steve is involved in forming and advising such businesses in many areas including limited liability company formation, contract negotiation, dispute resolution, employee shareholder/principal agreements, entity structuring, women owned business enterprises, and business succession planning. Steve also advises clients on estate, trust and long-term care planning, state and federal tax issues, and real estate transfers and leases.

Registration Information for Managing for Today & Tomorrow
Call the sponsoring Cornell Cooperative Extension Office or On-line:
Dryden Fire Hall, Route 13:  http://scnydfc.cce.cornell.edu/event.php?id=313  607-391-2660
Broome County CCE office, 840 Upper Front Street, Binghamton. 607-772-8953
https://pub.cce.cornell.edu/event_registration/main/events.cfm?dept=203
Cayuga County CCE office , 248 Grant Avenue, Auburn. 315-255-1183
https://pub.cce.cornell.edu/event_registration/main/events.cfm?dept=205
LaFayette Christian & Missionary Alliance Church, 6069 Cherry Valley Turnpike (Rt. 20) 315-424-9485
https://pub.cce.cornell.edu/event_registration/main/events_landing.cfm?project2016_231