Planning for Succession

Workshop series for agricultural businesses transitioning to a new generation

Members of each generation involved in agricultural business together are encouraged to attend this interactive workshop to learn about skills, tools and tactics needed for success in a multi-generation business.

Topics:

♦ Business Across Generations
♦ Vision, Values and Goals
♦ Are Time Lines Compatible?
♦ Issues & Concerns
♦ Assessing Your Current Situation
♦ Business Viability
♦ Know Your Leadership Team
♦ Skills and Abilities

♦ Family Business Communication
♦ Learning to listen with Your Head & Your Heart
♦ Presenting Ideas Proactively
♦ Family Business Meetings
♦ Management Training
♦ What about Non-farm Heirs?
♦ Equitable/Equal Dilemma

♦ Developing the Transfer Plan
♦ Legal Aspects
♦ Tax Considerations
♦ Financing the Transition
♦ Managing Risk - Crop Insurance
♦ Implementing the Plan
♦ Getting Organized
♦ Engaging a Transition Team

Choose a location convenient for you:

CCE Seneca County, Waterloo
Wednesday Evenings, 6:30—9:00 pm
November 6, 20 & December 11

CCE Monroe County, Rochester
Thursday Afternoons, 12:30—3:00 pm
November 7, 21 & December 12

CCE Wyoming County, Warsaw
Thursday Evenings, 6:30—9:00 pm
November 7, 21 & December 12

Topics:

♦ Business Across Generations
♦ Vision, Values and Goals
♦ Are Time Lines Compatible?
♦ Issues & Concerns
♦ Assessing Your Current Situation
♦ Business Viability
♦ Know Your Leadership Team
♦ Skills and Abilities

♦ Family Business Communication
♦ Learning to listen with Your Head & Your Heart
♦ Presenting Ideas Proactively
♦ Family Business Meetings
♦ Management Training
♦ What about Non-farm Heirs?
♦ Equitable/Equal Dilemma

♦ Developing the Transfer Plan
♦ Legal Aspects
♦ Tax Considerations
♦ Financing the Transition
♦ Managing Risk - Crop Insurance
♦ Implementing the Plan
♦ Getting Organized
♦ Engaging a Transition Team

Presenters:

NWND Dairy, Livestock & Field Crops Team
John Hanchar
Farm Business Management Specialist

Joan Sinclair Petzen
Farm Business Management Specialist

Ohio State University
Dr. Bernard Erven
Emeritus Professor

Primary interests are in farm and agribusiness management and human resource management in family businesses.

Lutz & Associates
John Montague
Financial Advisor

NY State University
Dr. Bernard Erven
Emeritus Professor

Primary interests are in farm and agribusiness management and human resource management in family businesses.

NYS Depart. of Agriculture & Markets
NY FarmLink
Daniel Welch
Business & Succession Planning Coord.

Accommodations for persons with disabilities may be requested by calling Sharon Wokott at 585-786-2251 by November 1 to ensure sufficient time to make arrangements. Requests received after this date will be met when possible.

Register by returning form with payment to:
Cathy Wallace
CCE Genesse Co/NWNY Team
420 East Main Street
Batavia, NY 14020

Checks payable to: Cornell Cooperative Extension

Register by Monday, November 4

Checks payable to: Cornell Cooperative Extension

Register on-line with credit card at:
http://www.nwnyteam.org/events.php

Registration Fee:
Per farm or family $60.00
NWNY Region discount (10.00) -____
Total Due $___

Plan to attend at:
____ Waterloo
____ Rochester
____ Warsaw

Building Strong and Vibrant New York Communities
Cornell University is an equal opportunity, affirmative action educator and employer.
Register your farm to participate by November 4th

Only $60 per farm for all 3 sessions

Planning for Succession Workshop series for agricultural businesses transitioning to a new generation

3 Convenient Locations:

- **W**arsaw: evenings Nov. 7, 21 & Dec. 12
- **W**aterloo: evenings Nov. 6, 20 & Dec. 11

Presented by:

Cornell University Cooperative Extension
NWNY Dairy, Livestock & Field Crops Team

401 North Main Street
Warsaw, NY 14569