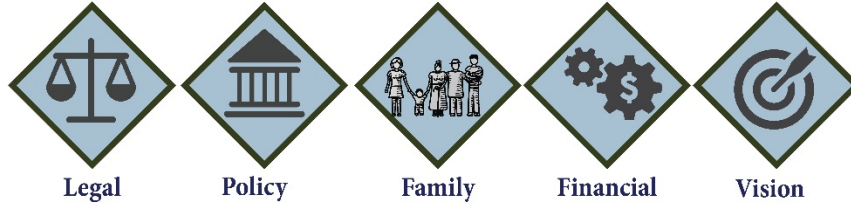


AG LEGACY SYMPOSIUM

MARCH 16, 2024



Legal

Policy

Family

Financial

Vision

You are invited to the Ag Legacy Symposium scheduled for Saturday, March 16, 2024 at the Sierra Valley Grange Hall in Vinton, Calif. This one-day event will prepare your farm or ranch or agri-business, big or small, for the transition to the next generation.

The sessions will cover legal aspects, financial topics, political factors, family dynamics, and provide real life scenarios for you to consider incorporating into your succession plan. This symposium is designed for those who need to kick start their estate plan, those with plans under development or those looking to refine their plan!

\$25 Early Registration at: <https://ucanr.edu/aglegacy>

DRAFT AGENDA

- 9:30 am** **Welcome** - Kasey DeAtley, Ph.D. Professor at Chico State and Tracy Schohr, UC Cooperative Extension
- 9:40 am** **Planning YOUR Ag Legacy** - John Hewlett, University of Wyoming Extension and Jeff Tranel, Colorado State University Extension
- 11:15 am** **Building Your Plan: Navigating Options, Legal Requirements & Minimizing Taxes** - Amanda Pedrett, Chico State Alumni, Partner at Hyatt McIntire & Associates
- 12:00 pm** **Lunch** (included with registration)
- 12:45 pm** **Producer Perspectives**
- **Tools for Estate Planning: Communication and Conservation** - Tim Koopmann, Rancher Alameda County
 - **Tools for Estate Planning: Team, Talent and Trajectory** - Ryan Schohr, Farmer Butte County
- 1:45 pm** **Synthesis** - John Hewlett, University of Wyoming Extension and Jeff Tranel, Colorado State University Extension
- 2:15 pm** **Taking Action Session** - Kasey DeAtley, Ph.D. Professor at Chico State and Tracy Schohr, UC Cooperative Extension
- 3:00 pm** **Adjourn**

