



University of California Cooperative Extension

# Succession Planning Workshop

## Transitioning Strategies for Farmers and Ranchers

For more information and to please **RSVP by April 15th:**  
UCCE – Siskiyou County (530) 842-2711 ★ [ckrivers@ucanr.edu](mailto:ckrivers@ucanr.edu)  
<http://ucanr.edu/sites/Livestock>



**When:** APRIL 17<sup>TH</sup>, 2019

**Time:** 10:00-4:00 **LUNCH PROVIDED**

**Location:** Intermountain Research and Extension Center (IREC)  
2816 HAVLINA RD.

TULELAKE, CA 96134

\$10/person. **RSVP BY APRIL 15<sup>TH</sup>!**

530-842-2711 or [sbclawson@ucanr.edu](mailto:sbclawson@ucanr.edu)

\*Engage your family in transitioning the Ranch/Farm successfully. This is an important topic not only at home, but for the future of agriculture as a whole. This workshop will focus on simplifying the succession process by giving you tools to help guide you through your individual plan.

**Kevin Charter, CFP, Edward Jones**



- Strategies and timing of Transition;
  - ranch continuation
  - Fair vs. Equal
  - case studies
- 401(k) and risk protection strategies
- Cash flow, savings investment strategies;
  - liquidity concerns
  - tax efficiencies
- Management and family culture

**Con Lynch, Insight Business Transitions, LLC**



- “Making the Call”
- Culture, Leadership, and Management
- Estate/Business Planning: how they interrelate
- Long term care
- Using Life Insurance for transitions

**Tim Koopmann, Rancher**

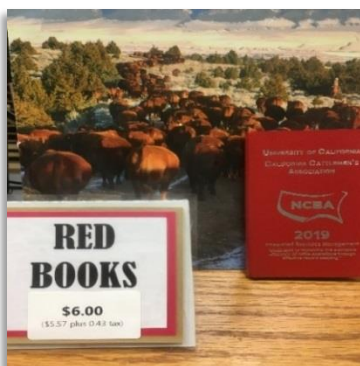
- Personal experience: Insight on a successful transition.



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**UCCE Siskiyou County Office**  
**1655 S. Main St.**  
**Yreka, CA 96097**  
**530-842-2711**



**UNIVERSITY OF CALIFORNIA**  
**Cooperative Extension**  
**Siskiyou County**



# Succession Planning Workshop

## April 17th

**Tulelake, Intermountain Research and Extension Center**

Cooperative Extension  
University of California  
1655 South Main Street  
Yreka, CA 96097

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