



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
<http://ucanr.edu/sites/Livestock>



When: APRIL 17TH, 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 15TH!**

530-842-2711 or 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

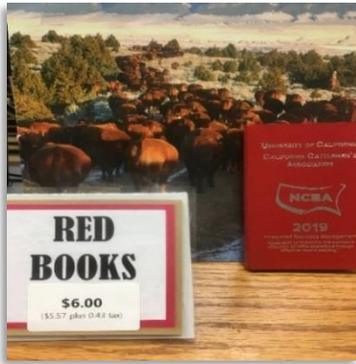
- Personal experience: Insight on a successful transition.



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Please make your check to UC Regents and get your Red Books before they are gone!

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
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