

Conference Agenda

Monday, January 14

9:00 – 10:00 a.m.	Waldorf Foyer	Registration
10:00 – 10:15 a.m.	Waldorf Room	Welcome, Introductions and Agenda Overview <i>Pam Fretwell, Farm Journal</i>
10:15 – 11:45 a.m.	Waldorf Room	The Foundation of a Succession Plan <i>Dick Wittman, Wittman Consulting and Idaho farmer</i>
11:45 a.m. – 12:00 p.m.		Break
12:00 – 1:00 p.m.	Waldorf Room	Lunch and Case Study Discussion <i>Dick Wittman, Wittman Consulting and Idaho farmer</i>
1:00 – 2:00 p.m.	Waldorf Room	Lessons from the Case Study <i>Dick Wittman, Wittman Consulting and Idaho farmer</i>
2:00 – 2:30 p.m.		Break
2:30 – 3:45 p.m.		Breakout Sessions
	PDR 1	The Best Entity for Estate Tax Planning <i>Paul Neiffer, CliftonLarsonAllen</i>
	PDR 2	Avoid These 5 Common Estate Planning Mistakes <i>Polly Dobbs, Dobbs Legal Group</i>
	PDR 3	My Kids Want Me Out, But I'm Not Ready to Go! <i>Rena Striegel, Transition Point Business Advisors</i>
4:00 – 5:15 p.m.		Breakout Sessions
	PDR 1	The Best Entity for Estate Tax Planning <i>Paul Neiffer, CliftonLarsonAllen</i>
	PDR 2	Avoid These 5 Common Estate Planning Mistakes <i>Polly Dobbs, Dobbs Legal Group</i>
	PDR 3	My Kids Want Me Out, But I'm Not Ready to Go! <i>Rena Striegel, Transition Point Business Advisors</i>
5:15 – 5:30 p.m.	Waldorf Room	Day One Takeaways and Q&A
5:30 – 7:00 p.m.	Waldorf Room	Networking Reception with Sponsors

All Legacy presentations available to download at www.TPSummit.com/legacy

Tuesday, January 15

6:30 – 7:30 a.m.	Learning Sessions and Breakfast	
6:50 – 7:15 a.m.	Waldorf Room	Getting the Next Generation Involved in Farm Management <i>Austin Burby, CPA, Tax Manager, CliftonLarsonAllen</i>
7:15 – 7:40 a.m.	Waldorf Room	Nurturing Your Farm and Agribusiness for Generations <i>Diann Andrews, Chuck Dierks, Dennis Henks, Art Littlefield, Megan Spain and Tim Veazey</i> <i>Lincoln Financial Advisors Agribusiness Services</i>
7:45 – 9:15 a.m.	Waldorf Room	Tax and Legal Strategies for Family Farm Transitions <i>Paul Neiffer, CliftonLarsonAllen and Polly Dobbs, Dobbs Legal Group</i>
9:15 – 9:45 a.m.		Break
9:45 – 11:00 a.m.	Waldorf Room	Setting the Stage for Transition: Expectations, Boundaries and Timelines <i>Rena Striegel, Transition Point Business Advisors</i>
11:00 a.m.		Adjourn

Thank you to our sponsors.

