



Estate Planning for Working Landscapes

Sponsored by Arizona Land and Water Trust and Santa Cruz NRCD

For many ranching and farming families, passing their land onto heirs and/or permanently protecting their land from encroaching development is a lifelong goal. The process of Estate Planning is critical in achieving these goals, and this workshop will cover the many options that are available to protect your family land. With both tax and legal advice provided, tax strategy topics will include; managing estate tax, Federal tax benefits and incentives, donating land by will, charitable remainder trusts, gifts of remainder interest, Family Limited Partnerships, Limited Liability Corporations, and much more.

Event Information

DATE: Wednesday January 22, 2014

TIME: 8:45 a.m. - 1:00 p.m.

LOCATION: Patagonia Community United Methodist Church
387 McKeown Avenue, Patagonia, AZ



Agenda

8:30 a.m. Sign In and Coffee Served

8:45 a.m. Welcome

Bill Schock, Chairman, Santa Cruz NRCD

9:00a.m. Arizona Land and Water Trust Introduction

Sharma Torrens, Land and Water Program Mgr.

9:30a.m. Estate Planning for Working Landscapes & Estate Transfer and Succession

Britt Simmons, CPA Regier, Carr & Monroe, LLP

William L. Asdell, Esq. Phillips, Moeller & Conway, PLLC

10:30a.m. Break

10:40a.m. Estate Planning for Working Landscapes & Estate Transfer and Succession
(Continued)

12:00p.m. Lunch Sponsored by Arizona Land and Water Trust

1:00p.m. Adjourn

Workshop Registration

There is no registration fee for this workshop.

Please help us in preparing for the lunch by registering by January 18, 2014.

Contact Sharma Hammond Torrens ph: 520-577-8564 email: shammond@alwt.org