

Seminar for Estate and Family Business Transfer Planning

WEST LAFAYETTE, Indiana – Two programs to help individuals, farmers, landowners and family businesses understand and make plans for the transfer of property interest are scheduled by Purdue University Cooperative Extension Service: at the REMC Bldg., Monticello, Friday, February 20 & North Judson Public Library, Feb. 27, 2009.

Estate and Family Business Transfer Planning includes many estate and business transfer topics. Gerry Harrison, Extension Ag economist and lawyer will present the information and take questions. Gerry is at the forefront of Purdue Extension Estate and Family Business Transfer Planning education for 35 years.

- Harrison will discuss basic and complex implications of various property ownership arrangements for estate and tax planning and transfer. He will review methods of avoiding probate including: beneficiary designation, joint ownership, gifts, trusts and remainder interests. Also in the course will cover: living wills, health care authority, wills, being without at a will. Implications of income, gift and estate and Indiana inheritance tax will be discussed as well as business organization choices.

- Emphasis is on helping understand tax minimization and how to completely avoid federal estate tax by following the law, with the use of charitable transfers, including farm land conservation easements.
- Five hours of continuing education credits are available for Indiana' lawyers, accountants and insurance producers.

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- **Pre-registration is required** with a small fee. For a registration form, contact a seminar host: Greg Bossaer, White County Extension Office by E-mail: gbossaer@purdue.edu; ph: 219-984-5115; Fax: 219-984-5147 or Michael Reetz, Pulaski County Extension Office, by E-mail: Reetz@purdue.edu; ph: 574-946-4312 or contact Gerry Harrison, toll-free at (888) 398-4636 ext. 44216 or direct dial Gerry on the Purdue Campus, 765-494-4216; E-mail: harrisog@purdue.edu .

