Estate & Family Business Transfer Planning:

Individuals, Spouses, Professionals and Family Businesses

Friday, February 27, 2009; 8:30 a.m. – 3:15 p.m., CST

North Judson Public Library -- 208 Keller Ave, North Judson, IN

This seminar is sponsored by Purdue Extension Pulaski and Starke Counties and the Department of Agricultural Economics, Purdue University. Topics discussed are intended for individuals, their spouses, adult children and especially those with interests in family-owned businesses. Professionals who assist others with their estate and financial planning needs are encouraged to register. Five hours of continuing education credit is available for Indiana professionals including: accountants (CPE), lawyers (CLE) and insurance producers (CE).

The **presenter** is Gerry Harrison, Extension Economist and member of the Indiana Bar. Harrison is a professor, Dept. of Agricultural Economics, Purdue University. Dr. Harrison has presented programs on estate and family business transfer planning for 35 years. Besides research, teaching and writing for Purdue Extension, he has taught three courses at Purdue: Estate and Family Business Transfer Planning, Federal Income Tax and Agricultural Law. You may contact Gerry with a toll free call: 1-888-398-4636; and ask for Ext.44216 or dial directly 765-494-4216; E-mail: <harrisog@purdue.edu>.

8:30 a.m. - Check-in — Coffee and continental breakfast.
8:55 a.m. - 11:30 a.m. Topics: Goals and Objectives —Your Vision? Property Ownership Law and Implications for Estate Planning, With and Without a Will, Avoiding Probate, Medicaid and Long Term Care Insurance, Federal Gift, Estate and Indiana Inheritance Tax.

Lunch Provided
12:15 p.m. - 3:15 p.m. Topics: More on Federal Gift and Estate Taxes Including Special Valuation of Farmland; Choices for Family Business Arrangements; Buy-Sell Agreements; Estate Planning with Living Trusts; Charitable Planning—Income and Gift and Estate Tax Planning plus Conservation Easements.

Materials will be provided. **Pre-registration is required.**

Purdue University is an equal opportunity/equal access/affirmative action institution.*

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Registration Form **Deadline February 24, 2009!**

Registration is $25 per individual; $15 for a registered individual's spouse; $75 if for professional continuing education--add $15 for an individual's second professional CE certification. Adult children are encouraged to attend and register as individuals. **Registration includes materials, continental breakfast, lunch and break drinks and snacks.**

Make a check payable to: **Pulaski County Extension Education Fund**. You may register by U.S. Mail or at the Pulaski or Starke County Purdue Extension Offices, Monday- Friday- 8:00 a.m.- 4:00 p.m. Phone:574-946-3412

Enclosed $_____.

(First)_____/ (last) _____ _____

Name *($25 fee or $75 if for CE, CLE or CPE credit)* *Registrant's Spouse ($15 fee)*

_____

Address

_____

City, State, Zip Code

_____

Telephone (Work/Home)

*E-mail:*_____

_____

Job or status (✓):_____Non-Farmer; _____Farmer; _____Landowner; _____Lawyer; _____Ins. Agent; _____Accountant; _____Small Business Owner; _____Spouse; _____ _____ Other; _____

Send to: PUCES-Pulaski County Office Bldg., Rm 120, 125 S. Riverside, Winamac, IN 46996-1528

_____ *I require auxiliary aids or services because of a disability. Contact host — Michael Reetz Ph:* 574-946-3412 Fax: 574-946-3680 E-mail: reetz@purdue.edu -- For special dietary needs contact host by Feb. 24, 2009.