Estate & Family Business Transfer Planning:
Individuals, Spouses, Professionals and Family Businesses
Friday, February 20, 2009; 8:30 a.m. – 3:15 p.m., EST
White County REMC, 302 North Sixth St., Monticello IN

This seminar is sponsored by Purdue Extension – White County 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.*

Cut Here

Registration Form **Deadline February 17, 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: White **County Extension Education Fund**. You may register by U.S. Mail or at the Purdue Extension – White County office, Monday.- Friday; 8:00 a.m.- 4:00 p.m. Phone: 219-984-5115.

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-White County Office, 12 N 25 E, Reynolds, IN 47980-8091

*____ *I require auxiliary aids or services because of a disability. Contact host — Greg Bossaer Ph:* 219-984-5115
Fax: 219-984-5147 E-mail: gbossaer@purdue.edu -- For special dietary needs contact host by Feb. 17, 2009.