

FARM SUCCESSION & ESTATE PLANNING
FOR FARM FAMILIES

Project Agreement

This is an agreement between you and both Washington State University Extension and Oregon State University Extension regarding your participation in the Farm Succession and Estate Planning for Farm Families Project. The project goal is for you to develop a succession/estate plan by December 2007.

WSU/OSU Extension Will Provide:

- Two three-hour estate planning workshops to provide information on family goal setting, family communication, estate planning guidelines, and tax implications so you can begin the process for successful transfer of assets.
- One free, individual, in-person work session after the first workshop with a WSU-trained project coach who will provide assistance with goal setting, writing questions for an attorney, organizing documents, and preparing for subsequent steps.
- Free, individual family support (via phone, mail, e-mail) from this coach through December 2007 to encourage each family to complete the estate planning process. The coach will not provide legal or financial advice.

Farm Family Expectations:

- *Participate* in **both** three-hour estate planning workshops.
- *Meet* with a WSU-trained coach after the first workshop to prepare for the subsequent workshop and next steps in the farm succession and estate planning process.
- *Consult* with appropriate legal and/or financial professionals
- *Complete* the estate planning process by December 2007 at your own expense
- *Complete* follow-up surveys

Name/Family _____

Address _____

Telephone _____ Fax _____ E-mail _____

Signature _____ Date _____

Signature _____ Date _____

Signature _____ Date _____

Signature _____ Date _____

Project funded by:

