

January 2, 2007

Dear Farm Family:

Thank you for participating in a recent Farm Succession and Estate Planning workshop offered by WSU Extension and OSU Extension. Outlines of the presentations are available on the internet at <http://www.spokane-county.wsu.edu/smallfarms/index.htm> Your participation demonstrates your willingness to address a tough but necessary topic, and we trust you will complete the process!

As we discussed at the workshops, *families that commit to continuing with the succession planning process will receive the free assistance of a WSU-trained coach through November 2007* when our grant funding ends. Enclosed is a flyer with more information about the coaches. One of them will contact you soon to offer support. This service is confidential and optional.

Due to the tremendous response and distant locations of families who signed commitment forms, the coaches will not be able to meet in person with the families unless it works in specific situations. Your coach will hold phone conferences with you to help you develop a timeline for completion of your farm succession plan and to provide assistance with the worksheets in the workbook "Ties to the Land". Your coach will also call you on a regular basis to offer encouragement, troubleshoot questions, and help you find needed resources. *The coaches are not licensed to provide legal advice or to replace the services of attorneys or accountants.*

Due to our agreement with the funding agency, we will send you periodic questionnaires and/or assignments to help us determine how the process is going and what other resources and information we can provide to assist you. We ask that you complete and return this information promptly. *While we don't need to know the details of your farm succession plan, your success in completing it by the end of 2007 will also become our success in our grant project!*

Your first assignment, to be completed before Workshop II in February 2007, is as follows.

- Read through the workbook "Ties to the Land" and watch the DVD.
- Develop a timeline to complete the various stages of the plan so you will be done by November 2007.
- Complete at least Worksheets One (Page 13), Two (Page 20), and Three (Page 21). You may need to adapt these worksheets to your particular farming operation. I suggest you make photocopies of the blank pages or develop your own on a computer so you can change them as needed.
- Broach the topic of developing a Farm Succession Plan with relevant family members and let them know you plan to hold a family meeting in the near future.
- Consider purchasing copies of the workbook for each household involved. ***Remember to let us know by Jan 31 how many you will need.***

More... →

The Workshops II will be held in February 2007. We encourage you to attend and to bring family members who weren't able to attend Workshop I. We are still finalizing the agenda for these workshops but they will include discussion on estate laws and writing wills, conducting successful family meetings, and a question and answer session on challenges families are encountering in the succession planning process. For this last session we will need to know what burning questions you have, so ***please submit your questions and concerns about the process to your coach by January 31.***

The workshops will last 3½ hours. ***Pregistration is required at least 2 working days prior to the workshop.*** Dates and contacts follow.

Last chance for Workshop I (rescheduled due to bad weather)

Wenatchee, WA

Tuesday January 16 - 5:00 p.m.

Contact Margaret Viebrock

509-745-8531

viebrock@wsu.edu

Workshops II

The Dalles, OR

Monday February 12 - 12:30 p.m.

Contact Brian Tuck

541-296-5494

brian.tuck@oregonstate.edu

Spokane, WA

Wednesday February 14 - 1:00 p.m.

Contact Diana Roberts

509-477-2167

robertsd@wsu.edu

Pendleton, OR

Tuesday February 13 - 8:30 a.m.

Contact Randy Mills

541-278-5403

randy.mills@oregonstate.edu

Ritzville, WA

Thursday February 15 - 8:30 a.m.

Contact Aaron Esser

509-659-3210

aarons@wsu.edu

Walla Walla, WA

Tuesday February 13 - 5:00 p.m.

Contact John Fouts

509-524-2685

fouts@wsu.edu

Wenatchee, WA

Thursday February 15 - 4:00 p.m.

Contact Margaret Viebrock

509-745-8531

viebrock@wsu.edu

If you have any questions don't hesitate to contact me at 509-477-2167 or robertsd@wsu.edu

Sincerely,

Diana Roberts, for the Farm Succession Planning Team
Area Extension Agronomist