

## IS RETIREMENT IN YOUR FUTURE?

Do you have questions about the future of your farm and the estate you leave behind?

Please join us for a Farm Succession and Estate Planning seminar on Wednesday, January 14<sup>th</sup>, 2015 from 10:30 a.m. to 2:00 p.m. at Romy's Holiday Inn, Kelly Lake. We will have three presenters: Rick Bollenbeck—an attorney who specializes in estate planning, Jared Nelson—Sr. Regional Financial Consultant from Farm Bureau Life Insurance, and Sarah Mills-Lloyd – Oconto UW Extension Agent.

Attendees will discuss viable solutions to business and estate succession issues many Wisconsin farm families face. The presentation will explore how to be fair to children in passing the business to heirs, while also providing a fair inheritance to non-active children, how to surmount common estate-tax traps; making sure attendees and their spouses are prepared for retirement and the potential need for long-term care; how to assemble and work with a team of professional advisors; and how to bring all these aspects together to make it work for the long term benefit of your family and farming operation.

A complementary lunch will be served at noon during the seminar for all who attend.

**Please save the date and join us then!**

Date: Wednesday, January 14, 2015

Place: Romy's Holiday Inn, 9600 Cty Rd G, Suring (Kelly Lake), WI 54174

Time: 10:30 am-2:00 pm with registration at 10:00 a.m. and lunch at noon

About our presenters:

Rick Bollenbeck is a graduate of the University of Wisconsin-Madison (1979), the Seattle University School of Law (1983) and Boston University (Masters of Law and Taxation) (1985). Rick practices in the areas of Estate Planning, Criminal Law and Litigation. He is an attorney with the firm of Bollenbeck Fyfe, S.C.

Jared Nelson, Sr. Regional Financial Consultant with Farm Bureau Life Insurance is a 1998 graduate of Carroll College. He has 16 years of experience in the financial services industry and focuses on helping farms transition assets from one generation to the next. He grew up on a dairy farm in Melrose, WI and now lives in Mt. Horeb with his wife and three daughters.

Dr. Sarah Mills-Lloyd, Oconto County Agriculture Agent is a graduate of Moorhead State University (1998 & 2000), and the University of Wisconsin-Madison School of Veterinary Medicine (2005). Dr. Mills-Lloyd was in private practice as an associate veterinarian for eight years in Northeast Wisconsin, working primarily with dairy cows and farmers. In October 2013, she joined UW-Extension as the Oconto County Agriculture Agent specializing in Dairy and Livestock.

Please RSVP to Betsy Leemon 920-921-6402 or [bleemon@ruralins.com](mailto:bleemon@ruralins.com). Your response is requested by January 7<sup>th</sup>.