

- Do you want to be in charge of who gets your assets after you're gone?
- Are you concerned about what your estate will cost your heirs?
- What are the best tools available to plan my estate?

If you want to address these questions, then plan to attend the Your Farm, Your Business, Your Future class.

Registration Fee:

All Three Sessions: \$110/person & \$50/each additional person from the same farm/family

Single Session: \$45/individual & \$20/each additional person from the same farm/family.

A light supper is included each evening.



If you need special accommodations because of a disability, or if you need materials in an alternative format, please contact the person below immediately.

An equal opportunity/access/affirmative action/pro-disabled and veteran employer.

For more information:

Contact Mary Sobba
Email: sobbam@missouri.edu
Phone: 573-581-3231



University of Missouri Extension
101 N. Jefferson St., Rm 304
Mexico, MO 65265

Estate, Succession & Retirement Planning

*Your Farm,
Your Business,
Your Future*

January 17, 24, & 31

Bad weather backup date February 7, 2019

6:00 to 9:00 pm

Locations:

Bowling Green

Pike County Courthouse
115 W. Main

Kirksville

Adair County Extension Office
503 East Northtown Road

Monroe City

Senior Nutrition Center
314 S. Main Street

Mt. Vernon

MU Southwest Research Center
14548 Hwy H

Osceola

First Baptist Church
555 Walnut St

Richland

Richland School
714 E. Jefferson Ave



Session 1 – January 17

\$45/individual,
\$20/additional family/farm member

Introduction & Retirement

- ◆ Goal Setting
- ◆ Effective Communication
- ◆ Calculations and Planning



Session 3 – January 31

\$45/individual,
\$20/additional family/farm member

Estate Planning

- ◆ Property Ownership
- ◆ Estate and Gift Taxes
- ◆ Wills
- ◆ Non-Probate Transfers
- ◆ Gifting
- ◆ Insurance
- ◆ Stepped-Up Basis

An Associate Circuit Probate Judge will be presenting Probate in Missouri.

Session 2 – January 24

\$45/individual,
\$20/additional family/farm member

Succession Planning

- ◆ Why Plan Your Estate
- ◆ Who Should be Involved
- ◆ What Materials You'll Need
- ◆ Business Organization
- ◆ Choosing Advisors
- ◆ SWOT Analysis

Ownership
Succession Wills
Probate Trusts Property
Calculations Estate Communication
Insurance
Planning
Retirement Family Gifting
Business Goals Taxes
Farm Advisors Analysis
Basis Missouri

Best Value - attend all sessions
\$110/person for all three sessions &
\$50/additional family/farm member



Classes will be facilitated and taught by
University of Missouri Extension faculty:

Darla Campbell
Karisha Devlin
Chris Kempke
Joe Koenen
Mary Sobba
Andrew Zumwalt

Contacts for the Bowling Green class:
Mary Sobba or Chris Kempke
Email: sobbam@missouri.edu
kempkec@missouri.edu
573-581-3231 or 573-769-2177

Estate, Succession & Retirement Planning

Please return by **January 11th** with registration fee.

Name(s): _____

Address: _____

City: _____ Zip: _____

Phone: _____

Email: _____

County of Residence: _____

Please indicate which session(s) you are attending.

____ Entire class - all three sessions

Will attend single sessions as marked below:

____ Retirement ____ Succession ____ Estate Planning

Circle location attending:

Bowling Green Kirksville Monroe City
Mt. Vernon Osceola Richland

Registration Fee:

All Three Sessions: \$110/individual & \$50/each additional person from the same farm/family (*one set of materials*). *Best Value*

(*Example: husband & wife would be \$110+50=\$160*)

Single Session: \$45/individual & \$20/each additional person from the same farm/family.

A light supper is included each evening.

Make checks payable to:

University Extension

Return this form with payment to:

Audrain Extension Center
101 N. Jefferson St., Rm 304
Mexico, MO 65265

