• 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 your estate?

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

Registration Fee:
$120/person & $60/each additional person from the same farm/family with one set of materials provided.

An evening meal on Friday and lunch on Saturday is included.

For more information or to Register for the Fulton location:
Contact Mary Sobba
Email: sobbam@missouri.edu
Phone: 573-581-3231

Estate, Succession & Retirement Planning

Aug. 23 & 24, 2019

Aug 23 (Fri.) - 1 p.m. to 8 p.m.
Aug 24 (Sat.) - 9 a.m. to 4 p.m.

Locations:
Fulton
Callaway County Extension Office
5803 County Road 302

Bethany
Harrison County Extension Office
1505 South Main

Higginsville
Lafayette County Extension Office
14 E 19th Street Suite 102

Kirksville
Adair County Annex Building
300 North Franklin

Mt. Vernon
MU Southwest Research Center
14548 Hwy H

An equal opportunity/access/affirmative action/pro-disabled and veteran employer.
Day 1 – Friday, August 23,
1 p.m. - 8 p.m.

Introduction
❖ Goal Setting
❖ Effective Communication
❖ Understanding Generational Differences

Succession Planning
❖ Who Should be Involved
❖ What elements make a business transfer work
❖ Business Organization
❖ Choosing Advisors
❖ SWOT Analysis

Day 2 – Saturday, August 24,
9 a.m. to 4 p.m.

Estate Planning
❖ Property Ownership
❖ Estate and Gift Taxes
❖ Wills
❖ Non-Probate Transfers
❖ Gifting
❖ Insurance
❖ Stepped-Up Basis
❖ Probate-A Missouri Probate Judge will be presenting.

Retirement Planning
❖ Developing Retirement Goals
❖ Retirement Concerns
❖ Retirement Options
❖ Choosing a Financial Planner

Classes will be facilitated and taught by University of Missouri Extension faculty:
Darla Campbell
Karisha Devlin
Chris Kempke
Joe Koenen
Mary Sobba
Andrew Zumwalt

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

Participants will receive the most benefit by attending both days
$120/person & $60/each additional family/farm member

Estate, Succession & Retirement Planning

Please clip & return by August 16th with registration fee.
Name(s):_______________________________________
Address:________________________________________
City:________________________ Zip:_____________
Phone:________________________ Email:______________
County of Residence:____________________________

Circle location attending:
Bethany  Higginsville
Fulton       Kirksville
Mt. Vernon

Registration Fee:
$120/individual & $60/each additional person
from the same farm/family (one set of materials).
(Example: husband & wife would be $120+60=$180)

Make checks payable to:
University Extension

Return this form with payment to:
University Extension
101 N. Jefferson St., Rm 304
Mexico, MO  65265

If special accommodations due to health or disability
are needed, contact Mary Sobba 573-581-3231 by August 16th.