Business Transition Workshop

Developing a strategy and tactics to navigate the process of transferring ownership and management of the family business to the next generation.

Your Workshop Trainers

George Twohig is the senior member of the agricultural law firm of Twohig Rietbrock Schneider & Halbach S.C. of Chilton, Wis. George has provided innovative, practical solutions to the unique planning and legal issues faced by farms and agri-businesses for more than 30 years. George received his law degree from Georgetown University, Masters in Management from Cardinal Stritch University and Bachelors in Business Administration from Marquette University. He serves on the Board of the State Bar of Wisconsin's Agricultural-Agri-Business Law Section and is a member of the American Agricultural Law Association, National Academy of Elder Law Attorneys, Financial Planning Association and the National Association of Tax Practitioners.

Dr. Deb Houden is a consultant with the Family Business Consulting Group Inc., specializing in helping family-owned businesses with family communication, transition and next-generation development. Dr. Houden earned her bachelor, masters and doctorate degrees from the University of Wisconsin-Madison, focusing on interpersonal communication, conflict resolution and perceptions of fairness within a family business. She has a Certificate in Family Business Advising and Family Wealth Advising from the Family Firm Institute and is active in post-doctoral work in Bowen Family Systems Theory.

www.pdpw.org

Professional Dairy Producers™
820 N. Main St., Suite D
Juneau, WI 53039

Business Transition Workshop

Three Locations & Dates:

Eau Claire, Wis.—Tuesday, Dec. 2, 2014
Green Bay, Wis.—Wednesday, Dec. 3, 2014
Madison, Wis.—Thursday, Dec. 4, 2014

Brought to you by
Professional Dairy Producers™

Business Transition Workshop

Choose the Date and Location that Works Best for You

Tuesday, Dec. 2
Sleep Inn & Suites Conference Ctr.
5872 33rd Ave.
Eau Claire, Wis.

Wednesday, Dec. 3
Radisson Hotel & Conference Ctr.
2040 Airport Dr.
Green Bay, Wis.

Thursday, Dec. 4
Crowne Plaza
4402 E. Washington Ave.
Madison, Wis.

9:30 a.m. **Registration**

10:00 a.m. **Welcome and Introductions**

10:15 a.m. **Circling of the Minds**
Dr. Deb Houden

While every family and every situation is different and business transition discussions can be difficult, these conversations can dramatically change the outcome of the transition plan.

Dr. Houden will go to the heart of the matter and discuss the "how" to get these often-uncomfortable conversations started. She'll also provide tips and tools that can bring about resolution. You'll learn how to:

- Speak openly to the next generation about taking over the business
- Encourage family members to discuss "what matters most," plus their wants, needs, hopes and fears
- Address discord, set personalities aside and define roles and responsibilities, including who is in charge

1:00 p.m. **Lunch**

1:45 p.m. **Ins & Outs of the Transition Structure**
Attorney George Twohig

No two farm succession plans look alike, and, as farms continue to evolve, so will your succession plan. How should your succession plan look? How often should you review it? Whether it's family or non-family members, goals of those involved will dictate the direction of your succession plan. Federal tax policy and farm programs frame the challenges and opportunities for transitioning farm businesses from current to future generations.

George will explain how you can use current tools to develop a succession plan that addresses individuals involved in the business as well as family members who are not. You'll learn. . .

- Ways to successfully transition the business while limiting income and estate taxes
- What's worked and not worked in real-world farm transitions
- Create a plan that addresses everyone's goals and needs

4:00 p.m. **Q&A with trainers**

4:30 p.m. **Conclude**

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Zoetis

Business Transition Workshop

Name _____

Business/Company Name _____

Mailing Address _____

City _____ State _____ ZIP _____

Phone (with area code) _____

Email _____

Circle Date and Location of Conference Attending

Tues., Dec. 2	Wed., Dec. 3	Thurs., Dec. 4
Eau Claire, Wis.	Green Bay, Wis.	Madison, Wis.

Registration fee covers workshop, materials and lunch.
Member Registration Rate: $125/person;
$75/add'l individuals from same dairy
Non-Member Registration Rate: $175/person
$125/add'l individuals from same dairy

	Member	Non-Member
First Participant	**$125 each**	**$175 each**
_____	$_____	$_____
Add'l Participants	**$75 each**	**$125 each**
_____	$_____	$_____
_____	$_____	$_____
TOTAL	$_____	$_____

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