**Action Team – Interview and Data Collection Form**

**Action Team Member:** Susan Nies

**How Might We:** provide educational support for the continued legacy of agriculture?

 Specifically in the area of succession and estate planning resources; legal financial, tax and practicalities in transition planning

**Data Source:**

 Name: variety of articles and potential contacts

 Contact: links to these articles and potential contacts

 Add Contact to Envision Contacts? Y/N

https://www.thefencepost.com/news/colo-land-link-program-connects-new-farmers-and-ranchers-with-landowners/ (Dan Waldvogle, Director of Land Link and with Guidestone)

http://guidestonecolorado.org/

http://guidestonecolorado.org/about-us/

http://guidestonecolorado.org/farm-succession-planning-a-critical-issue/

http://www.cobar.org/portals/cobar/repository/SLH/chap16.pdf (Colorado Senior Law Book chapter for the layperson, specifically on succession/estate planning for farms and ranches)

http://www.cobar.org/For-the-Public/Senior-Law-Handbook

https://www.usda.gov/topics/farming/resources-small-and-mid-sized-farmers

https://www.farmaid.org/our-work/resources-for-farmers/farmer-resource-guides/crisis-support-fa

http://www.flaginc.org/topic/estate-planning/rm-aid-resource-guide/

http://www.flaginc.org/about/

http://www.mda.state.mn.us/protecting/sustainable/mfo/beginningfarmer/land.aspx

https://extension.unl.edu/statewide/scottsbluff-morrill/farm-and-ranch-business-succession-estate-planning-workshops-in/

http://extension.colostate.edu/

http://chaffee.extension.colostate.edu/ (Kurt Jones, Chaffee County Director)

https://www.beginningfarmers.org/farm-succession/

ile:///C:/Users/Ron/Desktop/Documents/Susan's%20Folder/Final%20Certified%20Succession%20Coordinator%20flyer2017.pdf (re certified farm succession coordinator training)

http://www.bhgrlaw.com/people/attorneys/peter-d-nichols/

http://hutchinslaw.com/

http://www.kellerlawllc.com/home.html

http://buchananstouffer.com/firm-overview/

http://zimlawfirm.com/Mong.html (Daniel Mong)

**Insights:**

1. Succession/estate and transition planning are about both the current rancher/farmer transitioning out of the occupation/holdings and the one entering into it. Both need support with educational resources and there are websites and organizations that exist to help both!

2. Rather than reinventing the wheel by trying to create a new educational resource bank for legal, tax, and practical information regarding succession/estate/transition planning, we are blessed in Chaffee County to have at least two major organizations that are currently assisting farmers/ranchers in this area: Guidestone and its offshoot Land Link, and the Chaffee County office of the Colorado State University Extension office. Also, not included in my listings, but to my knowledge, many land conservation easement groups, such as the Central Colorado Conservesancy and CCALT’s groups also offer educational workshops on succession/estate planning to farmers and ranchers. To me, it makes sense to work and support the existing organizations to provide what is needed in our agricultural community.

3. The Colorado Bar Program puts out a Senior Law Handbook for laypeople that includes a chapter on succession/estate planning for farmers and ranchers that is helpful in highlighting issues for them to think about. . . There are also some lawyers in that article that are potential contacts for Envision or legal referral sources for farmers and ranchers.

4. There are national organizations that exist to support all ranchers and farmers with questions, resources and referrals reagarding successions/estate/transition planning. For example, I spoke with Wendy Reed of Farmers Legal Action Group (FLAG) which provides educational resources and a hotline regarding issues and referrals to help farmers and ranchers, nationwide, with their questions. The website is cited above.

5. Some other states have wonderful educational offerings on a broad array of topics for their farmers and ranchers on succession/estate/transition planning. I’m a little jealous!

6. There is actually an occupation of certified farm succession coordinator and a training program for it. Such a coordinator could be helpful in walking folks through the process or in providing a workshop about the issues that will be faced and how to deal with them.

Also, I spoke with Kurt Jones, Director of the Chaffee County Colorado State University Extension office and he said that the former director, who is now at the Pagosa springs office, is a mediator who is familiar with working with families. . . through such transitions. Perhaps she could be invited to come back to do some presentations for Chaffee County on the issues involved?

7. I have listed potential law firms/ lawyers that appear to practice law in Colorado in this topic area that could possibly be contacted in the future regarding being put on a referral list or to speak at educational workshops on the topic of succession/estate planning.

Any reports or maps or web links the team should read/review?

X