



# Transition, Estate and Retirement Seminar

For all generations involved with the family farm

**August 6, 2014**  
**9:00 am- 3:00 pm**  
Second National Bank Conference Room  
499 South Broadway  
Greenville, Ohio 45331

Topics:

- Strategies to Improve Family Communications
- Treating Farm and Non-Farm, Heirs Equitably
- Using trusts to manage Estate Transfers
- Gifting, Irrevocable Trusts and Other Wealth Transfer Tools
- Nursing Home Issues and Their Impact on Farm Assets
- LLC Agreements to Protect Farm and Personal Assets
- Federal Estate Taxes and their impact on Farm Operations
- Insurance options to provide Liquidity for Estate Taxes
- Medicaid vs Estate Planning
- Investment Strategies for Farmers
- Retirement Income Streams and Security for Elder Years

Speakers:

- Sam Custer, OSU Extension Educator, Darke County
- Robert Moore, Attorney, Wright & Moore
- Todd Durham, Vice President & Trust Officer, Second National Bank

For more information:

Sam Custer  
937-548-5215 or custer.2@osu.edu

**PRE-REGISTRATION IS REQUIRED.** \$15 per farm/family includes lunch and resource notebook. **Registration deadline is July 29 and is limited to 50 participants.** Make checks payable to OSU Extension. Please send checks and registration to: OSU Extension, Darke County, 603 Wagner Avenue, Greenville, Ohio 45331. Please detach and return this form with your payment. Thank you.

Names of each participant: \_\_\_\_\_

Daytime phone number: \_\_\_\_\_ Email address: \_\_\_\_\_

Address: \_\_\_\_\_

Total number attending/amount enclosed: \_\_\_\_\_

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