

Ties to the Land...

is coming back to Montana

Ties to the Land, a workshop designed to assist landowners with succession planning, has helped property owners throughout the northwest and will be in **Kalispell on Monday, April 30, 2018, 9:00 am - 5:00 pm**. Forest landowners, farmers and ranchers are welcome to attend and participate in the workshops.

Ties to the Land features a full-day interactive workshop to assist families to understand the basics of—and value of—family succession planning. Cost of the workshop is \$50 for the first family member and \$10 for each additional family member.

The Ties to the Land presentations, video clips and discussion work best with multiple family members participating in the workshop.



Because of the personal interactive nature of the workshops, **seating is limited to 25 people per workshop**, so please register soon. This is a tremendous opportunity for landowners to learn how to effectively plan your legacy with your family's goals and values in mind.

Endorsements by Fellow Montanans:

“**My family** attended this workshop because we have the same dilemma so many other families have: What happens to the place when we’re gone?”

— **Ed Levert**, Chairman of the Montana Forest Stewardship Foundation

“**This tried and tested workshop curriculum** has had excellent reviews from landowners in Idaho, Washington, Oregon and California. Now, Montana landowners and their family members have the same opportunity to begin charting a course for succession of family property. We all know taking the first step is often the greatest challenge. This workshop offers the guidance necessary for families to plan together for a successful future.”

— **Gary Ellingson**, Northwest Management, Inc.

“**Montana Tree Farm** strives to give people the tools they need to be effective stewards of Montana’s forests. Family forests are vital to our state’s clean water, air, wildlife habitat, and recreational activities, plus, they produce jobs and wood products that we all use. Workshops such as “Ties to the Land” help us achieve our goals in providing these tools to others.”

— **Mark Boardman**, Stoltze Land & Lumber and Montana Tree Farm

“**Family forest landowners** are a critical piece of the Montana forestry puzzle. Good succession planning is essential to the sustainable management of privately held forest lands, and all the benefits Montanans derive from them.”

— **Bob Harrington**, Former Montana State Forester, DNRC

Ties to the Land Workshop



Succession Planning for Landowners

The Human Side of Estate Planning



April 30, 2018

**MT Fish, Wildlife and Parks
Kalispeil**

Presented by:



Your family land legacy:

Planning for an Orderly Transition–Intergenerational Family Forest Project

Millions of acres of family-owned forest and agricultural land in the U.S. — and

thousands of Montana family-owned lands — will change hands in the next few years. Some forests and other rural lands may be converted to a different use because owners didn't take charge of the succession process in time. There are many reasons for this:

- Landowners may have a strong desire to pass their land on to their children but have not yet done the work necessary to ensure that result.
- Many landowners haven't talked to their children about who will take care of the family farm or forest after they're gone.
- Some owners have realized their children may lack the skills to manage the family land or may not be interested in doing so.
- Others assume that succession planning will be too expensive, and they aren't sure what the benefits will be. Other owners wait for their children to take the initiative. Or maybe they just don't know what to do next.

If any of these describe your situation, this *Ties to the Land* workshop is for you!



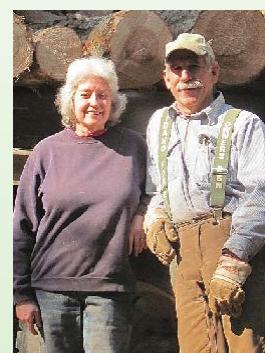
Workshop Program Content

Ties to the Land includes presentations, video clips, and interactive exercises on the following topics:

- 10 Steps to Successful Succession Planning
- Passion, Preparation, and Planning
- Family Ties, Differing Objectives
- Generation Gaps
- The Heirloom Scale, Values and Goals
- Conflicting Roles of Family and Business
- Tips for a Successful First Family Meeting
- Guidelines for Good Communication
- Choosing the Best Team of Advisors for You
- Putting the Plan Together, Success Strategies
- Transferring Ownership
- Legal and Financial Instruments

Your *Ties to the Land* Workshop Instructors

Montana welcomes **Madeline** and **Kirk David** to facilitate Montana's *Ties to the Land* workshop. Madeline and Kirk have a wealth of experience with family succession planning, and forest management. Thanks to Madeline and Kirk for bringing *Ties to the Land* to Kalispell on April 30, 2018.



Both Kirk & Madeline David:
Family forest landowners (Idaho, Montana, & Florida), Tree Farmers, Idaho State Tree Farm Committee members, Aldo Leopold Foundation Land Ethic Leaders, "Ties to the Land" Facilitators in WA, ID, MT from 2008 to the present.

Kirk: Society of American Foresters Fellow, ATFS Tree Farm Inspector Trainer, Idaho Forest Owners Association Executive Vice President

Madeline: LLC Business Owner/Manager.

Please return this form with a check (\$50.00/first family member + \$10/each additional family member attending) **no later than April 20**. A *Ties to the Land* workbook will be provided to each family. If you would like additional workbooks, please add \$25 per workbook.

Ties to the Land Registration Form

To register return this form with registration fee by April 20 to: Montana Forest Stewardship Foundation, PO Box 1056, Libby, MT 59923. Make checks payable to: Montana Forest Stewardship Foundation.

I/we plan to attend *Ties to the Land*:

Number of people attending: _____
Amount Enclosed: \$ _____

NAME(S): _____
ADDRESS: _____
CITY / STATE / ZIP: _____
PHONE: _____
E-MAIL: _____
NUMBER IN FAMILY ATTENDING: _____ Registration fee (per family or ownership) includes one workbook, CD, and refreshments.

Questions? Please call or email Ed Levert, 406-293-2847, televert@kvis.net

Kalispell - Monday, April 30, 2018

9:00 AM-5:00 PM
MT Fish, Wildlife and Parks, 490 North Meridian Rd.
Conference Room