

Registration is \$15 per person. **Due March 7th, 2014.** Return form and check payable to KSU.

Diann Gerstner  
350 S Range, Suite #16  
Colby, KS 67701

- Registration fees cover lunch and materials
- Late Registration or walk in is \$20 per person
- (Meal is not guaranteed with walk in registration)
- For Registration Questions call (785) 460-4582

\$ \_\_\_\_\_ **Amount Enclosed**

To register and pay online go to  
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**Preserving the Family with Estate Planning Registration**  
Select Date and Location:  Hoxie—March 13th  Hays—March 14th

Name(s): \_\_\_\_\_

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

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

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Please list any special accommodations needed (i.e. handicap accessibility, dietary restrictions, etc.): \_\_\_\_\_

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# Preserving the Family with Estate Planning



## Northwest Area Estate Planning Workshops

### Hoxie

March 13<sup>th</sup>, 2014

10:00 am - 3:30 pm

(9:30 Registration)

Immanuel Lutheran Church

### Hays

March 14<sup>th</sup>, 2014

10:00 am - 3:30 pm

(9:30 Registration)

Thirsty's Pub and Grill Banquet Room





### Stacy Seibel, Attorney

Stacy received her Juris Doctorate from the University of Kansas School of Law with an emphasis on estate planning and tax law and later received a Master of Laws in Taxation from the University of San Diego. She currently practices in Hays and

focuses on the unique needs of farming families and high net worth families concerned with death taxes. She has also taught Estate Planning courses for over 10 years and her services are sought after by financial advisors throughout Kansas.

### Mike Irvin, Kansas Farm Bureau Legal Foundation

A native of Goodland Kansas, Mike grew up on a farm and practiced law for over twelve years before he began his work as Kansas Farm Bureau's Legislative Counsel. Mike earned an undergraduate degree in Business Finance from K-State, a Masters in Public Administration from the University of Kansas, and a Juris Doctorate

from Washburn University School of Law. He has taught Business Law and Entrepreneurship undergraduate classes at K-State and also co-authored the book **Securing a Solid Future: Farm Financial and Transitional Planning Guidebook** (2005).



### Charlotte Olsen, Family Studies Professor and Extension Specialist, KSU

Dr. Charlotte Shoup Olsen has been a state Extension specialist in Family Systems for K-State Research and Extension for 20 years. Her Extension work focuses on helping families of all kinds to become stronger and more stable in their

family lives regardless of their situations. Charlotte comes from a farm family in southern Kansas and one of her special interests is working with farm families.



### Doug Beech, Planned Giving Officer, Kansas 4-H Foundation

Doug received his Bachelors and Masters degrees in Ag Economics from Cornell University in Ithaca, NY and came to Kansas State University in 1979 to lead the K-State Extension educational program in farm estate planning and farm

inheritance issues, and he also spent five years coordinating the KSU Tax Institutes around the state. Since 1994, he has served as the Planned Giving Officer for the Kansas 4-H Foundation at Kansas State University, and for the last several years from a home office in Garden City and Hays.



### Kathy Lupfer Nielsen, Family and Consumer Science Extension Agent

Kathy has worked for the K-State Research and Extension for 37 years, first in Lincoln County and then as part of Post Rock District Extension #1. She enjoys community history and helped with

the distribution of non-titled assets for her mother in law, who was the family historian of four different families.

## Program Schedule

- 9:30 Registration and Refreshments
- 10:00 Welcome & Introductions
- 10:00 **Estate Planning Basics, Stacy Seibel**  
What to do and what not to do when creating an estate plan. Learn about who needs a trust, who needs a will, and more estate planning tools.
- 11:00 **Get the Family Talking! Charlotte Olsen**  
Let's take time to recognize how communication with family members can help or hinder long range planning. Sometimes we need to think about the ways we interact with family members to understand what helps or hinders during estate planning discussions.
- 12:00 **Lunch and Speaker**
- 12:15 **Who Gets Grandma's Yellow Pie Plate? Kathy Lupfer Nielsen**  
Money can be divided up equally among your heirs, but personal possessions are another story. The transfer of non-titled property, regardless of its financial value, is an issue that impacts individuals and families. This session will help you learn to understand the sensitivity of transferring personal property and how families can accomplish this in a fair process.
- 1:15 **Leaving a Legacy, Doug Beech**  
This session will give a brief overview of the major tools— some familiar, some not— that allow someone to preserve and pass on their values through their estate plan. Topics will focus on general how-to information that will be helpful for those considering making charitable estate gifts and for local charity board members.
- 2:15 **Break**
- 2:25 **Farm Transition Planning, Mike Irvin**  
It is often difficult for farmers to discuss with children how they plan to transfer the farm. This process is further complicated when there are multiple non-farm siblings with various interests, to make an equitable distribution of inheritable assets. This session will explore how essential succession planning is to begin the process of transferring the farm.
- 3:25 **Wrap Up and Evaluation**

## Locations and Directions

### Hoxie Location—March 13th

**Immanuel Lutheran Church**  
1400 Locust St, Hoxie, KS

From Hwy 24 driving East you will enter Hoxie and pass Hwy 25. Turn left onto 14th St. Then turn right onto Locust St. where the Lutheran Church is on your left.



### Hays Location—March 14th

**Thirsty's Brew Pub and Grill Banquet Room**  
2704 Vine St, Hays, KS

From I-70, drive south on Vine Street. You will pass 29th Street and before reaching 27th Street, turn left into the shopping center Thirsty's Banquet Room is to the left of the Thirsty's restaurant entrance.

