Questions about...

✓ Starting the conversation about how to transfer family assets or deal with farm succession?
✓ Drafting or updating your will or trust documents?
✓ Powers of Attorney and Health Care directives?
✓ Impact of Estate or Inheritance Tax laws?

Monday, January 28
6:00 to 9:00 p.m.
in Elkader at the
Keystone AEA Center
1400 N 2nd St – Elkader
(see inside for registration details)
Doors open at 5:30 pm for Registration & Light Refreshment
Presenting at this seminar

Melissa O’Rourke, B.S., M.A, J.D, and Farm & Agribusiness Management Specialist for ISU Extension and Outreach

“Families and individuals often fail to plan adequately to protect assets that they have built over a lifetime of hard work,” says O’Rourke. “This may simply be due to confusion about how to build a plan to transfer assets — both during lifetime and after.” This seminar will answer questions and get you started on putting together a plan for lifetime transitions and estate planning.

O’Rourke is an experienced attorney who has worked with numerous families — including small-town and rural farm and ranch families in Iowa, South Dakota and Nebraska — as they look at estate & transition plans for the future.

“While a basic will can provide a good estate plan for simple estates, a trust may be more appropriate for some families and individuals,” states O’Rourke. O’Rourke explain estate tax guidelines, the use of trusts and lifetime gifting as estate planning and transition tools, along with information to assist you in working with your legal advisors. The importance of family conversations will be highlighted.

Registration Form:

Please register by January 25, 2019.

Name ________________________________________
Address_______________________________________
_____________________________________________________________________________________________________________________________
City___________________________________________
State_______________      Zip_____________________
Phone:________________________________________
Email _________________________________________

$10 fee to cover program costs including light refreshment & materials. ($15 for walk-ins).
Pre-registration needed to help adequately plan for seating, materials and refreshment.

Please mail form to:
ISU Extension — Clayton County
PO Box 357  Elkader, IA 52043
or call 563-245-1451
or email hloan@iastate.edu
Holly Loan, Executive Coordinator Clayton County

Program cost reduced thanks to sponsorship from Julie Doepke, Elkader.