

Estate and Tax Planning for the Family Farm: A List of Resources and Links to Tax and Planning Experts

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The Agricultural Law Resource and Reference Center
150 S. College Street, Carlisle, PA 17013
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www.dsl.psu.edu/centers/aglaw.cfm

RESOURCES

1. *Retiring from Farming*

<http://www.agriculture.state.pa.us/farmtransitions/cwp/view.asp?a=3&q=137721>

Pennsylvania Department of Agriculture Center for Farm Transitions
2301 North Cameron Street
Harrisburg, PA 17110-9408
Tel: 877-475-2686
Email: ddavidso@state.pa.us
Web: <http://www.agriculture.state.pa.us/farmtransitions/site/default.asp>

2. *The Estate Tax: Myths and Realities* (Revised June 13, 2006)

<http://www.cbpp.org/estatetaxmyths.pdf>

Center on Budget and Policy Priorities
820 First Street NE, Suite 510
Washington, DC 20002
Tel: 202-408-1080
Fax: 202-408-1056
Email: center@cbpp.org
Web: www.cbpp.org

3. *Financial Security in Later Life: A Cooperative Extension Initiative*

http://www.csrees.usda.gov/nea/economics/fsl/edu_estate.html

Cooperative State Research, Education, and Extension Service
United States Department of Agriculture
1400 Independence Avenue SW., Stop 2201
Washington, DC 20250-2201
Tel: 202-720-7441
Email: webcomments@csrees.usda.gov
Web: <http://www.csrees.usda.gov/>

4. *“Passing on the Farm” Workshops: Creating Farming Opportunities for the Next Generation*

Held regionally, these workshops foster farm succession planning and bringing the next generation onto the farm, either with family members or unrelated individuals. Organization also has other information available not on website.

<http://www.pafarmlink.org/services.html>

Pennsylvania Farm Link

2708-A North Colebrook Road

Manheim, PA 17545

Tel: 717-664-7077

Fax: 717-664-7077

Email: pafarmlink@dejazzd.com

Web: <http://www.pafarmlink.org>

5. *Farm Succession Risk Management Checklist Online*

Funded by the United States Department of Agriculture

http://www.familybusinessonline.org/resources/frm_chklist_farm.aspx

Dr. Patricia Frishkoff

Austin Family Business Program, College of Business, Oregon State University

201C Bexell Hall

Corvallis, Oregon 97331-2603

Tel: 541-737-3326/800-859-7609

Fax: 541-737-5388

Email: familybus@bus.oregonstate.edu

Web: www.familybusinessonline.org

6. *Retirement and Estate Planning for Farm Families*

Risk Management Agency/United States Department of Agriculture

<http://www.ces.purdue.edu/farmriskmgt/>

Marion Simon, Ph.D.

Kentucky State University

State Specialist for Small Farm and Part-time Farmers

400 East Main

Frankfort, KY 40601

Tel: 502-597-6437

Email: marion.simon@kysu.edu

Sharon DeVaney, Professor

Purdue University

Consumer Sciences and Retailing

Matthews Hall 216

812 W. State Street

West Lafayette, IN 47907-2060

Tel: 765-494-8300

Fax: 765-494-0869

Email: sdevaney@purdue.edu

7. *Eliminate Death Taxes*

<http://www.fb.org/issues/backgrd/deathtax06.501.doc>

American Farm Bureau
600 Maryland Avenue, Suite 800
Washington, DC 20024
Tel: 202-408-1080
Fax: 202-406-3604
Web: <http://www.fb.org>

8. *Handing Down the Family Farm: Redefining Tradition* (Article: One of a Four Part Series)

<http://www.cfbf.com/agalert/AgAlertStory.cfm?ID=610&ck=00AC8ED3B4327BDD4EBBEBCB2BA10A00>

California Farm Bureau Federation
2300 River Plaza Drive
Sacramento, CA 95833
Tel: 916-561-5500/800-698-FARM
Fax: 916-561-5699
Email: cfbf@cfbc.com
Web: <http://www.cfbf.com>

LINKS TO TAX AND PLANNING EXPERTS

1. *AgChoice Farm Credit*

<http://www.agchoice.com/index.php>

Timothy Sutherland, CFP[®], CPA
3301 W. Market Street
York, PA 17404
Tel: 800-246-6893
Email: tsutherland@agchoice.com

Web: (Branch locator) http://www.agchoice.com/index.php?pr=Branch_Locator

2. *MSC Business Services / Farm Management Services*

Pennsylvania Farm Bureau's Member's Services Corporation

Headquarters
510 South 31st St.
Camp Hill, PA 17011
Tel: 717-761-2740/717-731-3517
Fax: 717-731-3515
Web/Email: <http://www.pfb.com/member-services/financial-business/msc-business-services/contact-MSA.htm>

3. *Mette, Evans and Woodside, PC*

Pennsylvania Farm Bureau Legal Service Plan Alliance Partner

<http://www.pfb.com/member-services/financial-business/msc-business-services/legal-service.htm>

Harrisburg Office

3401 North Front St.

Harrisburg, PA 17110

Tel: 800-962-5097/717-232-5000

Fax: 717-236-1816

Wyomissing Office

1105 Berkshire Blvd.

Wyomissing, PA 19610

Tel: 610-374-1135

Fax: 610-371-9510

Email directory: <http://www.mette.com/email.asp>

Web: www.mette.com

4. *Boyer and Ritter*

Pennsylvania Farm Bureau Certified Public Accountants and Consultants Alliance Partner

Headquarters

211 House Avenue

Camp Hill, PA 17011

Tel: 717-761-7210/800-853-1120

Email: info@cpabr.com

Web: <http://www.cpabr.com/index.htm>