



CENTER FOR
DairyEXCELLENCE

For Immediate Release

Media Contact: Emily Barge, 717-346-0849; ebarge@centerfordairyexcellence.org

February 13, 2026

DAIRY FARM FAMILIES INVITED TO TRANSITION PLANNING WORKSHOP ON MARCH 24 IN UNION COUNTY, PA

The Interactive Workshop Will Feature Family Roundtable Discussions with Outside Advisors

Harrisburg, Pa. – It’s never too early or too late to start thinking about “passing the torch” and finding someone in line to transition ownership of your dairy business. Dairy farm families are invited to a “Passing the Torch” Transition Planning Workshop on March 24 in Lewisburg, Union County, Pa. Hosted by Penn State Extension and the Center for Dairy Excellence, the day-long workshop will cover everything from communication and family dynamics to legal and accounting considerations. The event will include lunch. Registration is \$25 total for the first two family members and \$5 for each additional family member. Call Emily Fread from Penn State Extension at 704-301-3441 or call Allen Hess from the Center at 717-788-0304 to register over the phone. Visit www.centerfordairyexcellence.org/passing-the-torch to register online.

“Maybe your kids are only in high school or college, and you’re not ready to pass the torch quite yet. It can take years to successfully transition your business, so having one-on-one conversations now can help down the road when you’re ready to begin the process. Maybe you don’t have a family member interested in taking over your dairy enterprise, maybe you’re just starting to think about retirement, or maybe you’re nearing retirement and haven’t thought about your succession plan at all. It’s not too late,” said Melissa Anderson, Programs and Operations Manager at the Center for Dairy Excellence. “No matter what stage or situation you’re in, this workshop will get everyone around the table for one-on-one coaching with facilitators, legal experts, accountants and more.”

During the workshop, attendees will learn about the overall transition process and key communication tips, the retirement planning process, the legal transition process, and the accounting transition process. Family members will also participate in one-on-one, interactive family roundtable discussions that are led by outside advisors to keep the process moving in a productive way. Attendees will walk away with a workbook and tangible next steps for taking action.

“Thank you for giving us a platform and context to start very difficult conversations. It was very helpful – even just to begin a starting point,” shared one dairy farmer who attended a previous workshop in this series.

Learn more about the sessions and speakers:

- **“How to Start the Farm Transition Process and Financial Considerations” with Dr. Brian Reed.** Brian Reed DVM, MBA has spent the last 36 years working with dairy farmers as a veterinarian. Since receiving his MBA degree in 2001, he has also been a dairy business consultant, assisting dairy families with strategic planning, profitability analysis and farm

transition planning. Dr. Reed also currently utilizes Center for Dairy Excellence resources to assist farm families going through the farm transition process.

- **“Retirement Planning: What to Think About” with Samantha Gehrett and Paula Ledney.** Samantha Gehrett is a Dairy Business Management Educator with Penn State Extension and is housed in Carlisle, PA. Her primary focus is to help dairy producers determine cost of production and develop farm business plans that help farms reach long-term goals and objectives. She brings experience in Accounting, Taxation, and Dairy Processing. This work is accomplished through on-farm visits, workshops and conferences and the development of tools and resources for producers and consultants.

Paula Ledney is an Extension Program Specialist in Penn State’s Department of Agricultural Economics, Sociology, and Education, where she focuses on enterprise budgeting and production education through the Ag Alternatives publication series. She also provides business management education on topics such as retirement planning, farm transition, federal taxation, and financial literacy. She holds an M.B.A. through Penn State’s Black School of Business and is also a Certified Farm Transition Coordinator with the International Farm Transition Network.

- **“Legal Considerations for the Farm Transition Process” with Jennifer Wetzel.** Jennifer Wetzel is dedicated to serving the legal needs of Pennsylvania’s farm and agri-business community. For the past 15 years, she has worked with all types of agricultural businesses across the state, advising them on a broad spectrum of legal issues. She is recognized for her in-depth knowledge of business succession planning, real estate and asset preservation within the agricultural law context. She has given presentations on these topics for the Pennsylvania Farm Bureau, Pennsylvania Bar Institute, Pennsylvania Farm Link, and Pennsylvania Bankers Association. Jennifer was appointed by Secretary of Agriculture, Russell Redding, to the Advisory Board for the Agricultural Business Development Center. She is a licensed title insurance agent and is a Succession Coordinator for the International Farm Transition Network and the Center for Dairy Excellence. Previously, she served as the Vice-Chairman of the Agricultural Law Committee of the Pennsylvania Bar Association.
- **“Accounting for Everyone: The Accounting Transition Process” with Tracy Garofalo.** Tracy Garofalo has been serving the needs of farmers and small businesses for almost 20 years in Pennsylvania, Maryland and Delaware. Tracy discovered her attention to detail and her natural accounting skills when she had her first accounting class in high school. Tracy went on to receive her BSBA and MBA from Shippensburg University, both of which majoring in Accounting. She spent five years as Controller of a private company specializing in professional fundraising for churches and non-profit organizations. She joined MSC Business Services in July 2005, where she earned the “Eagle” award for being the highest scoring staff person showing excellence in both her work ethics and ability to service clients. Over the course of 18 years, she held various positions within the company including Senior Account Supervisor and Regional Manager. In 2013, she passed and became an Enrolled Agent, which is the highest credential the Internal Revenue Service offers. In May of 2022, Tracy left MSC Business Services and opened her own accounting practice, Top Notch Accounting, Inc. where she is the President of the company.

Registration is \$25 total for the first two family members and \$5 for each additional family member. Entire dairy farm families are encouraged to attend the events. Call Emily Fread from Penn State Extension at 704-301-3441 or call Allen Hess from the Center at 717-788-0304 to register over the phone. Visit www.centerfordairyexcellence.org/passing-the-torch to register online.

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The Center for Dairy Excellence is a non-profit organization initiated by the Pennsylvania Department of Agriculture in 2004. Bringing together people from more than 40 different dairy organizations in Pennsylvania, the Center's mission is to enhance the profitability of the dairy industry by empowering people, creating partnerships, and increasing the availability and use of resources. Learn more at centerfordairyexcellence.org.

Center for Dairy Excellence ▼ 2301 North Cameron St., Harrisburg, PA 17110 ▼ 717-346-0849 ▼

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