



CENTER FOR
DairyEXCELLENCE

For Immediate Release

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SPEAKERS TO SHARE NEXT-LEVEL TRANSITION PLANNING INSIGHT AT NOVEMBER WORKSHOP

The Interactive Workshop Will Go Beyond the Basics With Transition Planning

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" Next-Level Transition Planning Workshop on November 12 in Bird in Hand, Lancaster County, Pa. Hosted by Penn State Extension and the Center for Dairy Excellence, the day-long workshop is designed to go beyond the basics when it comes to transition planning. Speakers will cover everything from communication and family dynamics to legal and accounting considerations. The event will include lunch. Registration is \$40 for the first family member to attend and \$10 for each additional family member. Visit www.centerfordairyexcellence.org/passing-the-torch to register online or call the Center at 717-788-0304

"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. If you have attended one of our previous 'Passing the Torch' workshops, this event is designed to take those topics to the next level with a deeper dive."

During the workshop, attendees will:

- Hear a more in-depth discussion about business structures and plans, when and how to use them, and more.
- Learn about pre-nuptials, post-nuptials, and how to structure them.
- Get more examples and case studies of different transition plans.
- Reflect on what your plan is if someone passes away unexpectedly.
- Hear success stories.
- Participate in one-on-one, interactive family roundtable discussions that are led by outside advisors to keep the process moving in a productive way.

"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 workshop speakers:

Mike McGrann is a Managing Director in the BBH Center for Family Business. In this role, he helps private business owners navigate issues at the intersection of family and business and is a trusted thought partner to owners as they manage complex issues around succession, growth, and legacy preservation. Prior to joining the firm, Mike spent over 25 years working with complex multigenerational family enterprises, families of wealth, and family offices around the world providing consulting services and educational programming.

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.

Mike Peachey is a CPA and partner with Acuity Advisors and CPAs, LLP, and leads the firm's agricultural services practice. Acuity's agricultural services group serves family owned agribusiness and production agriculture clients in the Mid-Atlantic region, providing consulting, business planning, and traditional financial and tax reporting services. In addition to practice leadership responsibilities, Michael advises clients and their owners on a variety of business growth, financing, succession and exit planning events in the life cycle of their family business. Michael believes that family businesses are the backbone of our communities and is passionate about helping family businesses grow, prosper, and transition generationally. He especially appreciates serving clients in the agricultural sector where the values of faith, family, and community are lived out.

Registration is \$40 for the first family member to attend and \$10 for each additional family member. Entire dairy farm families are encouraged to attend the events. Call 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.

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