Professional Training

Unique training opportunity for service providers to deliver enhanced farm succession planning assistance in New England.

As you probably know, succession is a major challenge for farm families. Successful farm transfers require a supportive and knowledgeable team of service providers. This new professional development project will strengthen the knowledge, skills and collaboration of a diverse group of service providers who work with—or want to work with—transitioning farm families in various ways across New England.

Whether you are an experienced succession advisor, have relevant knowledge, or hope to do more, this project welcomes you. This initiative is funded by the USDA Northeast Sustainable Agriculture Research and Education Program through a two-year grant to Land For Good (LFG). LFG has been offering farm succession planning assistance to farmers and farm families in New England and training to other professionals across the U.S. since 2004. This project builds from our previous regional training activities.

Project Details

The purpose of this project is to train and connect a range of service providers who play a role on farmers' succession advising teams. The project is designed to help you meet your personal learning objectives. While LFG has had to make project adjustments due to the COVID pandemic, our basic objectives remain:

1. Develop skilled professionals in each New England state who will use a team approach to advise and support transitioning farm families
2. Build the technical skills of attorneys and financial experts who are the core of succession advising teams.

Who is this project for?

There are two categories of participants:

Professionals who play a role in succession planning assistance. Your role can range from introducing the succession topic in your work with farmers, making informed referrals, and contributing specific expertise (e.g., easements, health care planning) to assessment and facilitation. We invite Extension educators, land trusts and other conservation organizations, farmer education and support organizations, mediators, farm agency personnel, farm link programs, lenders and insurance providers.

Attorneys, attorneys-in-training, and agricultural financial professionals such as farm financial management consultants, farm business planners, and tax accountants. For you, digging in the weeds of farm estate and tax planning, entity choice, laws and rulings sounds like a good time!

Not sure if this project is for you? Ask us.

What is involved in signing up for the project?

- Meet your learning objectives with a personal learning contract
- Join an online training in January, 2021 with other professionals working or wanting to work on farm succession planning in your state
- Provide support to at least 4 farm succession clients over the project period
- Participate in 2 state-based peer-to-peer support calls, to review cases and share support
- Complete pre-work and readings from LFG's online project library shelf
- Complete pre- and post-training surveys and other project evaluation instruments
- For attorneys and financial advisors, attend the regional technical training in spring, 2021

There are two parts to this project: state-based service provider trainings; and an attorney and financial advisor seminar. All project participants must commit to a state-based training. Details are outlined below.

You set your own goals in an individualized learning contract and commit to project components. This lets you focus on what you want to get from the project and from your colleagues. Your goals will help inform and guide the project. You will be sent a link to the contract after you register. You can modify your personal learning contract at any time.

Service Provider Trainings for all project participants

Build professional relationships within your state to more effectively serve transitioning farm families. State-based trainings will take place via Zoom. Trainings will run from 10 a.m. to 3 p.m. with a one-hour lunch break and several stretch breaks. You are expected to attend at least one state training. You are welcome to attend a training in each state where you/your organization works.

State trainings will take place in January, 2021.

- Maine: January 14, 2021 – Register now
- New Hampshire: January 19, 2021 – Register now
- Connecticut: January 20, 2021 – Register now
- Vermont: January 21, 2021 – Register now
- Massachusetts: January 26, 2021 – Register now
- Rhode Island: January 27, 2021 – Register now

What will be covered in these state trainings?

- Succession planning components and process
- Professional roles, responsibilities and tasks
- Farm and family assessment

- Team approaches to succession planning assistance
- “Soft skills” such as communications, facilitation, and conflict management
- Diversity and cultural differences
- No identified successor; family v. unrelated transferees
- Resources and referrals

More peer-to-peer learning. To provide ongoing support, state team calls will share cases, engage in peer-to-peer mentoring, and problem solve. The calls will focus on participants sharing the work they are doing with farmers, questions, challenges, and successes. Two calls will be scheduled between February and April. (Calls will be 90 minutes max.)

Interact with at least 4 farm families around their succession planning between February and May. Your interaction will depend on your role(s) and their situation. You will document your work and be asked to share about it (respecting confidentiality) on training calls and in project reporting.

Attorney & Financial Advisor seminar

An intensive 2-day seminar for attorneys and financial advisors will focus on the legal and financial components of farm succession plans. This seminar will be a unique opportunity for peer-to-peer learning and network-building, with presentations by experts, small group case and problem-solving clinics, and round-table “best practice” discussions.

This technical seminar will be held at a future time in person or virtually as conditions allow. *Stay tuned for more details.*

Attorneys and financial advisors are also expected to attend at least one state training session. (Attend state trainings where you work in or hope to work in. This is your opportunity to connect with other succession planning advisors in that state.)

This technical seminar will cover:

- Entity selection
- Asset transfer methods
- Tax planning & tax issues
- Financial assessments
- Estate planning applied to farms & farmers (including trusts and other instruments)
- Non-traditional methods & tools
- Health care planning and Medicaid protection
- Farmland conservation & farm transfer
- Integrating legal & financial considerations in farm succession planning (team approach)
- Resources

Eager to get started?

We’ll send out a reading packet and materials before the state-based trainings. In the meantime, check out these useful resources:

- Toolbox for professionals
- Farm Succession Advising: Attorney Training Compendium

Contact us for individualized support.