Succession Planning Institute
Missoula, MT Nov 21 & 22

Time	Topic	Who
	SATURDAY	
Noon	Succession Planning Institute Expectations **What happens when there is no plan.**	Jodi Koterba- MFU Welcome Speaker **Marsha Goetting**-
1:30-2	Complete- Identifying what is important Worksheet 1 Each Participant individually complete	Introduction and instructions by Jodi Koterba
2-2:15	Snacks Available	
2-2:45	Discuss Expectations and importance Identifying what is important- Family	Multi-generational family discussion
2:50-5:00	**FENCES: Families Engaging Nicely Communicating Expectations for Success**	Speaker **Jane Worley**
5-6	Dinner	
6-7	Discuss disagreements in expectations	Multi-generational family discussion facilitated by Jane Worley/ Jodi Koterba
	SUNDAY	
7:00-8:00	Breakfast	
8:00-9:00	What we have and where they are? - **FAMILY FINANCIAL MANAGEMENT** What should my attorney know checklist	Speakers -John Wagner
9:00-9:45	Examine Goals- Long-term, intermediate, and short-term FAMILY FINANCIAL MANAGEMENT -What should my attorney know checklist -Individual Goals Worksheet	Each Participant
9:45-10:15	Identification of Mutual Family Level Goals	Multi-generational family discussion
10:15 11:30	**Switching Hats**	**Brent Turner-agri-generational**
11:30 -12	Succession Planning Next Steps, What will you do? -Life Estate -Settling an Estate -Wills -Trusts -Business Structures -Taxes -Deeds -Succession Law	Virtual check in schedule/Institute evaluation: Jodi Koterba, MFU Education Director