

# ESTATE PLANNING WORKSHOPS



## About the Presenter

Marsha A. Goetting is a Professor and Extension Family Economics Specialist at Montana State University in Bozeman. During the past seven years she has presented over 450 educational sessions reaching over 13,000 Montanans with financial and estate planning information. She has received state, regional and national state awards for her programs. Dr. Goetting received her Bachelors and Master's degrees in Family Economics and Adult Education from Kansas State University. Her Ph.D. is from Iowa State University.



**Tuesday, January 29<sup>th</sup>, 2019**

**Mason Building • 131 S. Spruce Street • Townsend, MT**

**Come to one session or both! It's your choice!**

## Schedule of Workshops

### **Families and Legacies: Challenging Decisions | 2:00-4:00 pm**

While everyone owns some type of property—saving accounts, stocks, mutual funds, automobiles or a home—many are unaware how the wording on accounts, titles, or deeds determines who receives them upon the owner's death. *"Most people have strong feelings about who gets the property we have worked so hard to accumulate,"* says Dr. Marsha Goetting, MSU Extension Family Economics Specialist. Dr. Goetting has combined her career-long emphasis in estate planning with her recent passion for wildflowers in a creative presentation. Regardless of your age, financial situation, or marital status you will learn facts that will help you jump-start your estate planning preparations.

### **Dinner - Sponsored by Performix Nutrition | 5:30 pm**

### **Succession Planning for the Next Generation of Montana Farmers and Ranchers | 6:00-8:00 pm**

An important goal for many Montana farm/ranch family enterprises is to transfer land and business to the next generation. The process is challenging because it includes a complex web of economic, legal, and family decisions. Some families avoid the process completely and die without a will, trust, or any type of transfer plan in place. Other families confess they started the process but found they did not want to deal with the conflict that arose because of the differences among members regarding goals, values and perceptions of fairness and equity. Dr. Marsha Goetting, MSU Extension Family Economics Specialist, will explore what happens when a farmer/rancher dies without a plan, equal vs. equitable division of property, ways to avoid probate, and ideas for conversation starters.

**Please RSVP for dinner by Friday, January 25<sup>th</sup> by phone 406.266.9242 or email [broadwater@montana.edu](mailto:broadwater@montana.edu).**

If you have any dietary restrictions, need any special accommodations or have questions about the physical access, please contact MSU Extension in Broadwater County at 406.266.9242 in advance of your participation or visit. *Montana State University Extension is an ADA/EO/AA/Veteran's Preference Employer and Provider of educational outreach.*