



## Thank You !

- ❖ MA Dept. of Conservation and Recreation – Service Forestry
- ❖ MA Executive Office of Energy and Environmental Affairs
- ❖ Shorna Broussard Allred – Cornell University

# Agenda

- Introduction
- Why Estate Planning? Paul Catanzaro
- Landowner Decisions
- Organizing great events Jay Rasku
- Estate planning workshops Wendy Sweetser
- Questions & Answers

# Estate Plan

- ◆ An “Estate Plan” is not a single, all-encompassing document
- ◆ A process that includes the development of a combination of documents (e.g., will) and tools (e.g. conservation restriction) that achieve your personal and financial goals when implemented together.
- ◆ Estate planning is for everyone...not just those that own estates!

## Land as an Asset

- ◆ Land is likely one of the most valuable assets
- ◆ Land is not like other assets, it has both financial and personal or emotional value.



## The Challenge

- ❖ Ensuring that both financial and personal needs are being met.



## Land Is a Flexible Asset

- ◆ Dividing assets means the challenging of addressing both these financial and personal needs.
- ◆ Land is a flexible asset that lend itself to creative solutions for gaining both financial and personal values from it.
- ◆ The challenge is to get landowners to investigate their options.



## Goal: Keep the Plates Spinning

- ❖ Conservation Easement
- ❖ Type of ownership
- ❖ Wills and Trusts
- ❖ Family Communication
- ❖ Whatever it takes.....



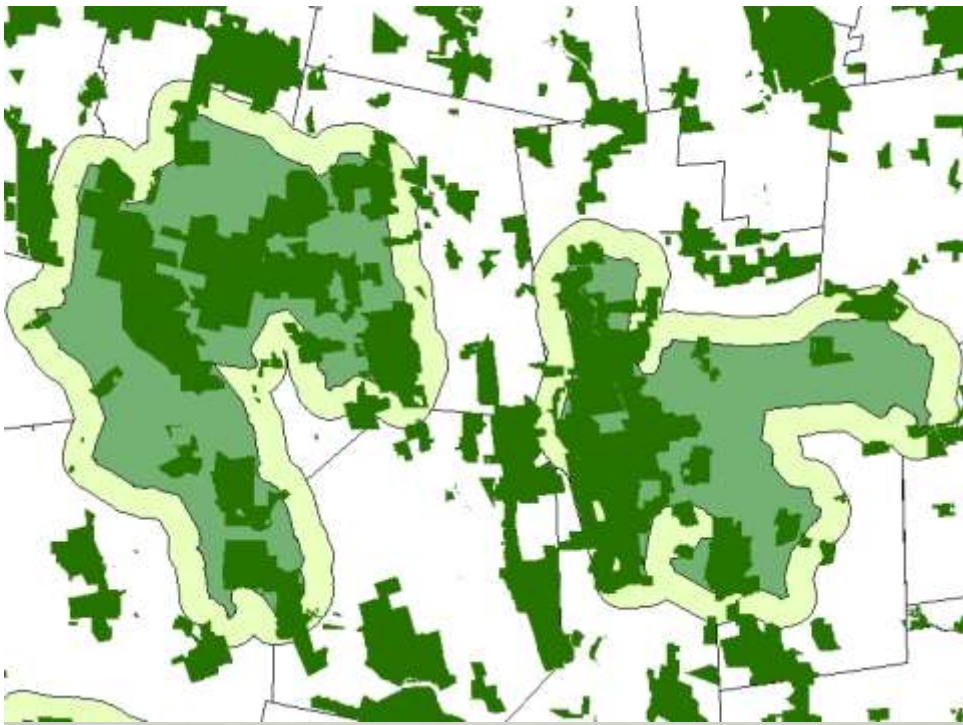
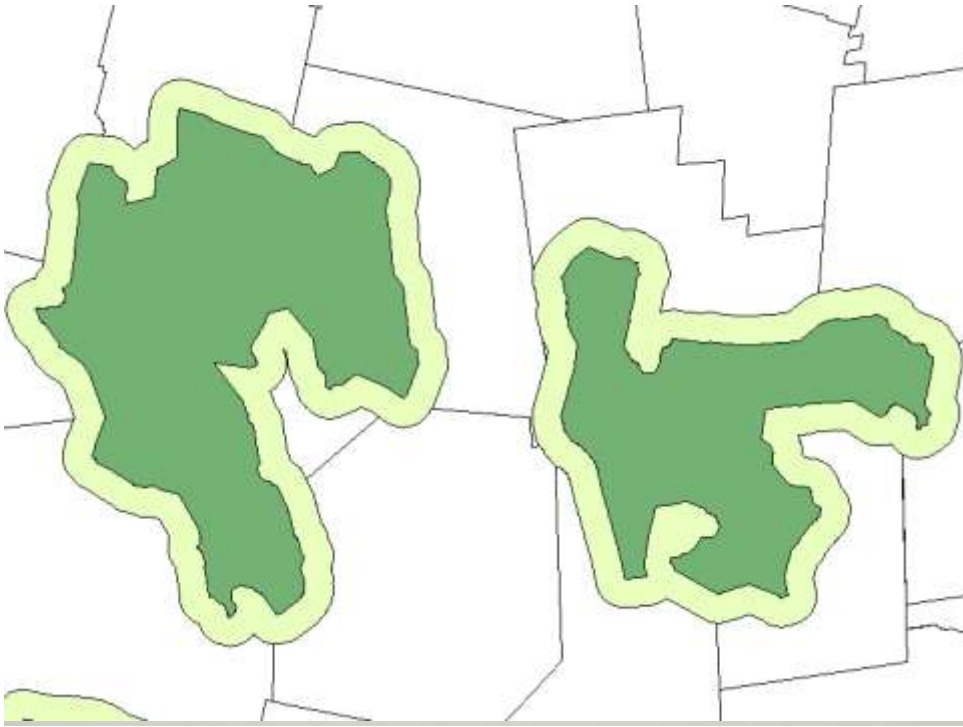
## The future of the land?

- ❖ Avg. age of a landowner **>60**
- ❖ **73%** of MA's forest parcels >10 acres are owned by people > 55
- ❖ **Don't assume land will transfer through the family!**



## What's at Stake?







This is at stake too!



# Landowner Decisions

- ❖ Most Landowners simply enjoy their land
- ❖ Don't plan ahead
- ❖ Infrequent
- ❖ Reactive
- ❖ Often hurried & without the benefit of all their options
- ❖ Often greatly complicated by family dynamics



When decisions do arise,  
landowners often turn  
to friends and neighbors.





## Why Friends and Neighbors?

- ❖ Trusted
- ❖ Unbiased
- ❖ First hand experience
- ❖ Know local information
- ❖ Know us
- ❖ Share our values
- ❖ Available for time sensitive decisions



Most significant predictor of openness to conservation: they knew their neighbors.

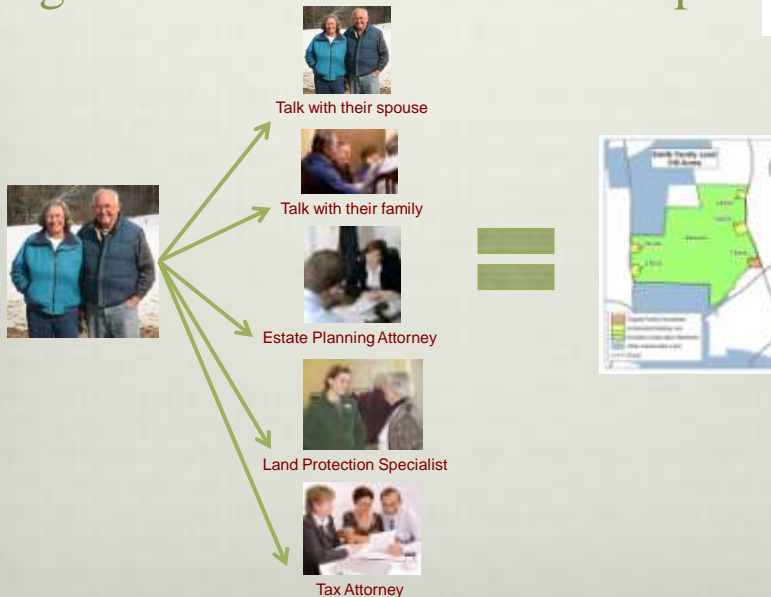
- *UMass Landowner Survey*



When decisions aren't being made...  
it's the time to build trust and the  
conservation network!!!



When decisions are being made...  
get landowners to the next step!



## Be Patient and have reasonable expectations!

Remember.....

- ❖ Landowner decisions are infrequent!
- ❖ Recognize the opportunity and connect someone at a decision point with a person or resource that can help!
- ❖ Estate planning can take years...**keep the plate spinning!**



## Organizing Great Estate Planning Events

## 1) Define Your Goals

- Short Term
- Long Term



## 2) Define your Audience



## 3) Content and Agenda

- Format
- Presenters
- Location



## 4) Logistics



- |                  |                     |
|------------------|---------------------|
| • Date & Back up | • Air temp          |
| • Time of Day    | • Restrooms         |
| • Materials      | • Directional signs |
| • Facilitator    | • Nametags          |
| • Time Keeper    | • Food              |
| • Greeters       | • Coffee            |
| • Photographer   | • Funds             |
| • AV             | • Evaluations       |
| • Microphone     |                     |

## 5) Recruitment Message

- The Hook
- Who, What, Why
- Problem, Solution, Action



## 6) Messenger

- More important than the message
- Peer- to - Peer



## 7) Delivering the message

- Passive
- Active



## 8) Planning and Preparing

- Make a Plan
- Set People Up for Success
- Build Momentum
- Event Team
- Trial Run



## 9) Event!

- Unflappability
- Actively Facilitate
- Evaluations
- Photographs



## 10) Follow up

- Evaluation & Debrief
- Thank you
- Momentum





## 10 Steps:

- 1) Define Goals
- 2) Define Audience
- 3) Content and Agenda
- 4) Logistics
- 5) Message
- 6) Messenger
- 7) Delivering the Message  
(Active & Passive)
- 8) Planning and Preparing
- 9) Event!
- 10) Follow up



## Estate Planning Event Content

- Land goals and values
- Family communication and decision making
- Estate planning for land (taxes, ownership structure, wills and trusts)
- Land conservation options

## Workshop Speakers

- Estate planning attorney, tax attorney, OR CPA/financial planner
- Land protection specialist
- Local landowner who has made a plan or protected their land
- Service foresters

## Workshop Format

- One session: Landowner, land protection options, estate taxes
- Two sessions:
  - 1) Family communication, setting goals, meeting facilitator, local landowner
  - 2) Land protection and estate taxes

## Workshop Content

- Land Protection: What is a land trust? CE, Fee simple, Life estate, Limited Development, Tax incentives
- Estate Planning Attorney: Ownerships, Distribution plans, Wills and Trusts
- Tax Attorney/CPA/Financial Advisor: Estate taxes, gift taxes, Generational skipping tax, Capital Gains tax, Charitable trusts
- Landowner: Experiences, process, costs, contacts, emotions

## Best Bets

- Storytellers!
- Food
- Leave with at least one next step articulated



## Follow Up

- I-I Time with attorney or land trust
- Peer/neighborhood meeting
- Complimentary membership to land trust



## Follow Up

- Write down next steps and timeline, with option for a reminder/accountability check in
  - Postcard reminder
  - Phone call or email
- Evaluation- steps taken, obstacles to moving forward



## Lessons Learned

- Woodlots are not typical businesses
- There is not always a 'next generation'
- Long, complex, and emotional process
- Be patient, it's worth it in the end
- Don't overwhelm
- Estate planning is for everyone



## Resources


- Your Land, Your Legacy
- Professional referrals
- Land trust contact info
- Your organization's materials
- Local landowner contacts and stories
- Websites ([www.masswoods.net](http://www.masswoods.net))

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# Mass Woods Forest Conservation Program

Harvesting Timber | Sales of MFLD | Tree & Land Professionals | Landowner Programs | Mining Update | Management Report | FAQ

**Harvesting Timber**



**John Mass Woods**  
Executive Director  
UMass Forestry, 100 West  
St. 100333

**John Mass Woods**  
Executive Director

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**For harvesting information see...**


**Harvesting Timber:  
Deciding the Future of My Land**  
(Estate Planning and Land Products)

**Find a Land Trust or Forester in your town**

The map below will provide you critical information for land trusts, foresters, estate planning professionals, and conservation organizations working in your town.

Click on the name of the town in which your property is located to view the town's available information.

[Map](#) [Legend](#)



**Local Mass Forestry**

File last updated 03/22/2011

**Significant Updates**

"Your Land, Your Legacy: Deciding the Future of Your Land" website available for viewing. Visit now.



CA, 51818 Foreland Calculator has been updated with GIS tools. Go to the calculator.

**Library Resources**

AGSIS  
Bookstore  
Massachusetts  
Massachusetts  
ENR/Forestry  
Census Forestry (Library)  
Harvesting Information System  
Inventory of the Forest  
UMass Forestry  
UMass Forestry Conservation Program  
Forest Conservation  
Library

**Conservation Links**

Forest Conservation  
UMass Forestry

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## Detailed Information for Businesses in the Field

**Land Trust**

A land trust is a nonprofit, non-governmental organization that acquires and/or conserves land for some public purpose.

**Public Land Trust**  
 100 West St., 10th Floor  
 Amherst, MA 01003  
 Phone: 413/253-2000  
 Fax: 413/253-2000  
 Website: www.masslandtrust.org

**Massachusetts Forestry Trust**  
 100 West St., 10th Floor  
 Amherst, MA 01003  
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<p><b>Estate Planning Attorneys</b></p> <p>Lawyers who specialize in estate planning, conservation law and/or land use.</p> <p>MA Land Trust Coalition Service Provider List Website: <a href="http://www.massland.org/CP/EstateLawyers">www.massland.org/CP/EstateLawyers</a></p> <p><b>Certified Financial Planner</b></p> <p>A Certified Financial Planner is a professional who can help you set and achieve your long-term financial goals through investment, income, and retirement planning.</p> <p>Certified Financial Planner Board of Standards Website: <a href="http://www.cfp.net/cfsaah/">www.cfp.net/cfsaah/</a></p> <p><b>Certified Public Accountant</b></p> <p>A Certified Public Accountant is a licensed professional who understands tax codes and specializes in helping individuals prepare tax returns.</p> <p>MA Society of Certified Public Accountants Website: <a href="http://www.masscpaonline.org/consumer/ind_a_cpa/">www.masscpaonline.org/consumer/ind_a_cpa/</a></p> <p><b>Appraisers</b></p> <p>Appraisers familiar with valuing land for conservation purposes. Click the link below to view the list.</p> <p>MA Land Trust Coalition Service Provider List Website: <a href="http://www.massland.org/CP/Content/Appraisers">www.massland.org/CP/Content/Appraisers</a></p> <p><b>Mediator</b></p> <p>A Mediator is a certified professional who is trained to assist families in having difficult conversations and can help your family reach consensus about the future of your land.</p>	<p>Phone: 978-674-5469 Email: <a href="mailto:cpennema@aol.com">cpennema@aol.com</a> Business Name: Carol Environmental Consulting</p> <p>John Edwards P.O. Box 78 22 Middle Street Hadley, MA 01035 Phone: (413) 585-8697 Email: <a href="mailto:edwards773@yahoo.com">edwards773@yahoo.com</a></p> <p>Lincoln Fish 115 Nash Hill Road Haydenville, MA 01039 Phone: 413-269-3288 Email: <a href="mailto:alfisho@comcast.net">alfisho@comcast.net</a> Website: <a href="http://www.baystateforestry.com">www.baystateforestry.com</a> Business Name: Bay State Forestry Service</p> <p>Jeff Golay 0 Bog Pond Road Barey, MA 01290 Phone: 978-317-3707 Email: <a href="mailto:jefggolay@gmail.com">jefggolay@gmail.com</a> Business Name: Every Day Dirt Forestry</p> <p>Mel Harder Drewell H East Hartford, CT 06037 Phone: (860) 653-2444 Email: <a href="mailto:mel_harder@net.net">mel_harder@net.net</a> Website: <a href="http://retiree_at_large.tripod.com/">retiree_at_large.tripod.com/</a></p> <p>Steve Hardy 1037 Western Ave Ste #6 Brattleboro, VT 05301 Phone: 802-257-1544 Email: <a href="mailto:gmforest@comcast.net">gmforest@comcast.net</a> Business Name: Green Mountain Forestry LLC</p>
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## MassWoods

### Forest Conservation Program

[Harvesting Timber](#) | [Times of My Land](#) | [Find a Local Professional](#) | [Landowner Programs](#) | [Monthly Update](#) | [Steakpage Report](#) | [FAQ](#)

**Deciding the Future of My Land**

Your land is a part of your legacy. You have been a good steward of your land. Deciding what will happen to your land after you are gone is the next critical step of being a good steward. In fact it may be the most important step you can take as a landowner. Who will own your land and how will it be used? What will your legacy be?



Your land is likely one of your most valuable assets, especially if you have owned it for a long time and it has increased in value. However, there is more to land than just its financial value. Because land can be connected to memories, experiences, and feelings, your land may also have significant personal value. Deciding what to do with your land brings with it the challenge of planning for both these financial and personal needs.

Some of your family may be interested in receiving personal value from the land by leaving it in its current, natural state. Others may be interested in receiving financial value from the land or in obtaining a piece of land to build a home. And, of course, it is also possible that your family may want or need a little of both. The good news is that land is a flexible asset that lends itself to creative solutions for gaining both personal and financial value from it. However, it is to take some planning.

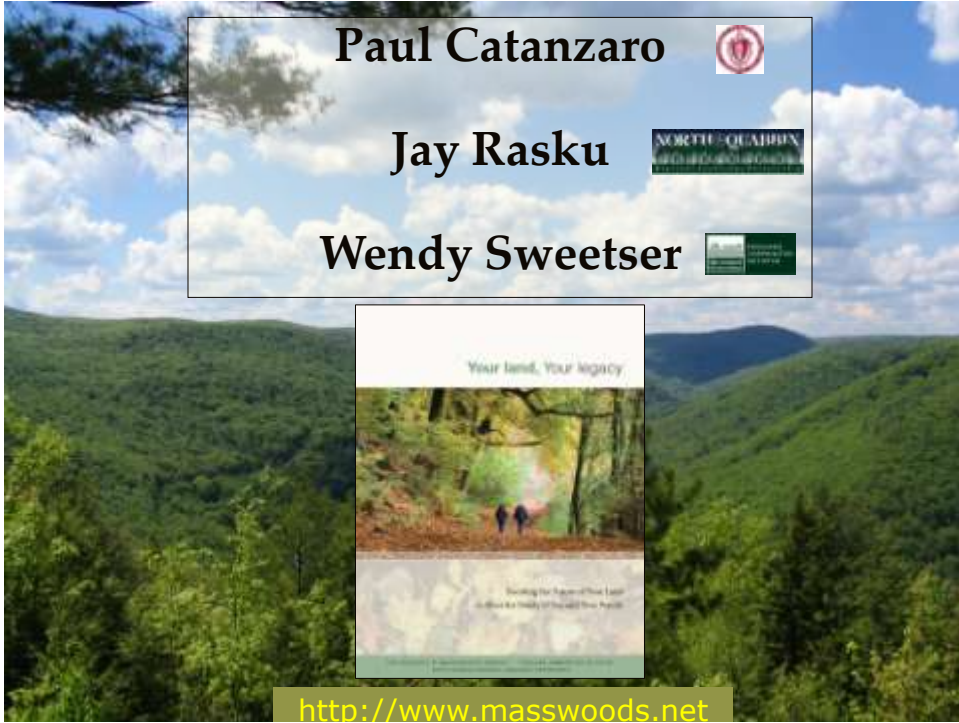
An estate is the total of all of your assets, including your land. An estate plan ensures that your assets are distributed in a way that will meet the financial and personal needs of you and your family. An estate plan isn't one all-encompassing document. It is best thought of as a process that includes the development of a combination of documents (such as a will) and tools (such as conservation restrictions) that achieve your goals when implemented together.


**Related Links**


- [Find a Forester or Land Trust specialist in your town](#)
- [Find a Neighbor with Training and Experience in Forest Conservation](#)
- [Create an Conservation](#)
- [MA Land Trust Coalition](#)
- [Forest Landowners Guide to Internet Resources - Estate Planning](#)
- [Wildlands and Woodlands](#)


**Related PDF Documents**


- [Your Land, Your Legacy \(8 MB\)](#)
- [Your Land, Your Legacy Checklist](#)
- [Land Conservation Options](#)
- [Your Land, Your Choice](#)
- [Support the Members on Forest Conservation](#)
- [Conservation Tax Incentives](#)
- [Estate Planning Part Sheet](#)
- [Conservation Restrictions Part Sheet](#)
- [Info about Conservation Restrictions](#)



**Paul Catanzaro** 

**Jay Rasku** 

**Wendy Sweetser** 



<http://www.masswoods.net>

**Questions?**