

Protecting Your Legacy Workshop

October 5, 2019

9:00 – 3:30 p.m.

AGENDA

- 9:00 Arrive and check-in; refreshments available
- 9:15 Introductions and overview
- 9:30 Making the Case for Keeping Forests as Forests
Overview of situation
- 9:45 Legacy Planning Nuts and Bolts
What is legacy planning and why do it?
What do we know about how landowners make decisions?
Discussion: Where are you in the process of legacy planning?
- 10:15 Break
- 10:30 The Role of Professionals in Landowner Legacy Planning (John Lavelle, Lavelle & Finn, LLP)
Stories from the field (Examples of the challenges facing families with woodlots)
How professionals support the legacy planning process
Case examples of working with landowners on legacy
- 12:00 Lunch
- 12:45 Panel Discussion with Landowners
Two landowners share their stories of legacy planning
- 1:30 Helping landowners consider the future of their forest with Legacy Outreach Resources
Outreach resources to support keeping forests as forests
Outreach Resources: *Protecting Your Legacy* Publications
Outreach Resources: *Using a Will to Protect Your Land*
Outreach Resources: Videos
Outreach Resources: Love Your Land, Make a Plan Brochure
Outreach Resources: Forest Story Cards
Outreach Resources: Conversation Starters
Outreach Resources: NY Legacy Planning Website
Group Activity: Practice using resources and starting conversations based on scenarios
Suggestion: How can Forest Story Cards be used in family conversations?
- 2:30 How will you use these tools in the next year?
Activity: Using available resources to make well-informed decisions
- 3:30 Closing and evaluation