Estate and Tax Planning for the Family Farm:  
A List of Resources and Links to Tax and Planning Experts  

(June 2006)

The Agricultural Law Resource and Reference Center  
150 S. College Street, Carlisle, PA 17013  
717-241-3517  
aglaw@psu.edu  
www.dsl.psu.edu/centers/aglaw.cfm

RESOURCES

1. Retiring from Farming  
http://www.agriculture.state.pa.us/farmtransitions/cwp/view.asp?a=3&q=137721

Pennsylvania Department of Agriculture Center for Farm Transitions  
2301 North Cameron Street  
Harrisburg, PA 17110-9408  
Tel: 877-475-2686  
Email: d davidso@state.pa.us  
Web: http://www.agriculture.state.pa.us/farmtransitions/site/default.asp

2. The Estate Tax: Myths and Realities  
(Revised June 13, 2006)  
http://www.cbpp.org/estatetaxmyths.pdf

Center on Budget and Policy Priorities  
820 First Street NE, Suite 510  
Washington, DC 20002  
Tel: 202-408-1080  
Fax: 202-408-1056  
Email: center@cbpp.org  
Web: www.cbpp.org

http://www.csrees.usda.gov/nea/economics/fsll/edu_estate.html

Cooperative State Research, Education, and Extension Service  
United States Department of Agriculture  
1400 Independence Avenue SW., Stop 2201  
Washington, DC 20250-2201  
Tel: 202-720-7441  
Email: webcomments@csrees.usda.gov  
Web: http://www.csrees.usda.gov/
4. “Passing on the Farm” Workshops: Creating Farming Opportunities for the Next Generation
Held regionally, these workshops foster farm succession planning and bringing the next generation onto the farm, either with family members or unrelated individuals. Organization also has other information available not on website.
http://www.pafarmlink.org/services.html

Pennsylvania Farm Link
2708-A North Colebrook Road
Manheim, PA 17545
Tel: 717-664-7077
Fax: 717-664-7077
Email: pafarmlink@dejazzd.com
Web: http://www.pafarmlink.org

5. Farm Succession Risk Management Checklist Online
Funded by the United States Department of Agriculture
http://www.familybusinessonline.org/resources/frm_chklist_farm.aspx

Dr. Patricia Frishkoff
Austin Family Business Program, College of Business, Oregon State University
201C Bexell Hall
Corvallis, Oregon 97331-2603
Tel: 541-737-3326/800-859-7609
Fax: 541-737-5388
Email: familybus@bus.oregonstate.edu
Web: www.familybusinessonline.org

6. Retirement and Estate Planning for Farm Families
Risk Management Agency/United States Department of Agriculture
http://www.ces.purdue.edu/farmriskmgt/

Marion Simon, Ph.D.
Kentucky State University
State Specialist for Small Farm and Part-time Farmers
400 East Main
Frankfort, KY 40601
Tel: 502-597-6437
Email: marion.simon@kysu.edu

Sharon DeVaney, Professor
Purdue University
Consumer Sciences and Retailing
Matthews Hall 216
812 W. State Street
West Lafayette, IN 47907-2060
Tel: 765-494-8300
Fax: 765-494-0869
7. **Eliminate Death Taxes**

   American Farm Bureau
   600 Maryland Avenue, Suite 800
   Washington, DC 20024
   Tel: 202-408-1080
   Fax: 202-406-3604
   Web: [http://www.fb.org](http://www.fb.org)

8. **Handing Down the Family Farm: Redefining Tradition** (Article: One of a Four Part Series)
   [http://www.cfbf.com/agalert/AgAlertStory.cfm?ID=610&ck=00AC8ED3B4327BDD4EBEBBCB2BA10A00](http://www.cfbf.com/agalert/AgAlertStory.cfm?ID=610&ck=00AC8ED3B4327BDD4EBEBBCB2BA10A00)

   California Farm Bureau Federation
   2300 River Plaza Drive
   Sacramento, CA 95833
   Tel: 916-561-5500/800-698-FARM
   Fax: 916-561-5699
   Email: cfbf@cfbc.com
   Web: [http://www.cfbf.com](http://www.cfbf.com)

**LINKS TO TAX AND PLANNING EXPERTS**

1. **AgChoice Farm Credit**

   Timothy Sutherland, CFP®, CPA
   3301 W. Market Street
   York, PA 17404
   Tel: 800-246-6893
   Email: tsutherland@agechoice.com

2. **MSC Business Services / Farm Management Services**
   Pennsylvania Farm Bureau’s Member’s Services Corporation

   Headquarters
   510 South 31st St.
   Camp Hill, PA 17011
   Tel: 717-761-2740/717-731-3517
   Fax: 717-731-3515
3. **Mette, Evans and Woodside, PC**  
Pennsylvania Farm Bureau Legal Service Plan Alliance Partner  

Harrisburg Office  
3401 North Front St.  
Harrisburg, PA 17110  
Tel: 800-962-5097/717-232-5000  
Fax: 717-236-1816

Wyomissing Office  
1105 Berkshire Blvd.  
Wyomissing, PA 19610  
Tel: 610-374-1135  
Fax: 610-371-9510

Email directory: [http://www.mette.com/email.asp](http://www.mette.com/email.asp)  
Web: [www.mette.com](http://www.mette.com)

4. **Boyer and Ritter**  
Pennsylvania Farm Bureau Certified Public Accountants and Consultants Alliance Partner  

Headquarters  
211 House Avenue  
Camp Hill, PA 17011  
Tel: 717-761-7210/800-853-1120  
Email: [info@cpabr.com](mailto:info@cpabr.com)  
Web: [http://www.cpabr.com/index.htm](http://www.cpabr.com/index.htm)