

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

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The Agricultural Law Resource and Reference Center  
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[aglaw@psu.edu](mailto:aglaw@psu.edu)  
[www.dsl.psu.edu/centers/aglaw.cfm](http://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: [ddavidso@state.pa.us](mailto:ddavidso@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](mailto:center@cbpp.org)  
Web: [www.cbpp.org](http://www.cbpp.org)

### 3. *Financial Security in Later Life: A Cooperative Extension Initiative*

[http://www.csrees.usda.gov/nea/economics/fssl/edu\\_estate.html](http://www.csrees.usda.gov/nea/economics/fssl/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](mailto: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](mailto: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](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](mailto:familybus@bus.oregonstate.edu)

Web: [www.familybusinessonline.org](http://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](mailto: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

Email: [sdevaney@purdue.edu](mailto:sdevaney@purdue.edu)

**7. *Eliminate Death Taxes***

<http://www.fb.org/issues/backgrd/deathtax06.501.doc>

American Farm Bureau  
600 Maryland Avenue, Suite 800  
Washington, DC 20024  
Tel: 202-408-1080  
Fax: 202-406-3604  
Web: <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=00AC8ED3B4327BDD4EBBEBCB2BA10A00>

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](mailto:cfbf@cfbc.com)  
Web: <http://www.cfbf.com>

***LINKS TO TAX AND PLANNING EXPERTS***

**1. *AgChoice Farm Credit***

<http://www.agchoice.com/index.php>

Timothy Sutherland, CFP<sup>®</sup>, CPA  
3301 W. Market Street  
York, PA 17404  
Tel: 800-246-6893  
Email: [tsutherland@agchoice.com](mailto:tsutherland@agchoice.com)

Web: (Branch locator) [http://www.agchoice.com/index.php?pr=Branch\\_Locator](http://www.agchoice.com/index.php?pr=Branch_Locator)

**2. *MSC Business Services / Farm Management Services***

Pennsylvania Farm Bureau's Member's Services Corporation

Headquarters  
510 South 31<sup>st</sup> St.  
Camp Hill, PA 17011  
Tel: 717-761-2740/717-731-3517  
Fax: 717-731-3515  
Web/Email: <http://www.pfb.com/member-services/financial-business/msc-business-services/contact-MSC.htm>

**3. *Mette, Evans and Woodside, PC***

Pennsylvania Farm Bureau Legal Service Plan Alliance Partner

<http://www.pfb.com/member-services/financial-business/msc-business-services/legal-service.htm>

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>

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>