Seeing the Forest for the Trees: A Survey Course on Advising Woodland Owners in Vermont

Vermont Bar Association Continuing Legal Education Program

Wednesday, June 28, 2017
8:30 am to 12:30 pm
Capital Plaza Hotel, Montpelier

If you have clients who own land, with trees – whether a neighborhood forest or a vast tract of timber – this program will expand your knowledge of the unique resources, legal issues, and range of key professionals available to assist woodland owners in successful stewardship and long-term succession planning for their forests. You will hear from woodland owners and private, non-profit, and governmental agencies on common elements of and issues that arise in working with woodland owners, their families, and their professional advisors in the process of woodland succession planning.

This program is designed for all attorneys, regardless of practice area or level of experience, with a goal of improving our capacity to provide succession planning assistance to forest land owners in Vermont.

Panelists:

**Trevor Evans**, Tree Farm Owner, Derby, Vermont; Certified Family Forest Owner, Outstanding Tree Farmer of the Year; Community Volunteer (VT Coverts, Northwoods Stewardship Center), Author, *Forest Trees of Vermont* (Forestry Press)

**Jamey Fidel**, General Counsel, Forest and Wildlife Program Director, Vermont Natural Resources Council

**Annette Lorraine, Esq.**, Attorney, “Land as Legacy” Consulting, Montpelier, Vermont

**Al Robertson**, Tree Farm owner, Sheffield, Vermont; Community Volunteer (Vermont Woodlands Association, Secretary; State Tree Farm Committee, Co-Chair; member, National Woodland Owners Association and Vermont Coverts); Retired US Army engineer

**Marisa Riggi**, Conservation Director, Northeast Wilderness Trust

**Mary Sisock**, UVM Extension Forester

**Sarah G. Tischler, Esq.**, Attorney, Langrock Sperry & Wool, LLP

**Audrey B. Winograd**, JD, MSW, Law and Social Work Fellow, UVM/VT LEND
Program Agenda

8:30 am  Welcome

8:40 am  Vermont’s Forests, Its Owners and the Vermont Forest “Economy”
  
  Vermont’s Forests – Impacts of Preservation and Fragmentation
  Jamey Fidel, General Counsel, Forest and Wildlife Program Director, Vermont Natural Resources Council

  Vermont’s Forest Owners – Demographics, Generational Cycles and Trends
  Mary Sisock, UVM Extension Forester

  Pressures and Tools Impacting and Enhancing Succession Planning
  Panel

9:15 am  Conservation Easements
  
  What and How - Conservation Easements
  Marisa Riggi, Conservation Director, Northeast Wilderness Trust

  Landowner Perspective – Conservation Easements: Yes, No, Maybe?
  Trevor Evans, Derby, Vermont
  Al Robertson, Sheffield, Vermont

10:15 am  BREAK

10:30 am  Family Matters: Estate Planning and Family Communications
  
  Estate Planning ~ Strategies and Considerations for Real Estate and Families
  Annette Lorraine, Esq. and Sarah G. Tischler, Esq.

  Family Meetings – Preparation, Plunging In, Developing an Action Plan
  Audrey B. Winograd, JD, MSW and Mary Sisock, UVM Extension Forester

11:45 am  War Stories – Tips, Traps and Timber Tales
  
  Guided review and discussion of the succession planning process generally, the
  expertise needed along the way, and the resources and tools available for
  attorneys and their clients, with a focus on multi-disciplinary collaboration,
  networking, financial support, and assistance to aging forestland owners
  Panel and Attendees

12:30 - END