

Forest Taxation and  
Estate Planning Conference

Registration Form

Name: \_\_\_\_\_

Organization  
or Company: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

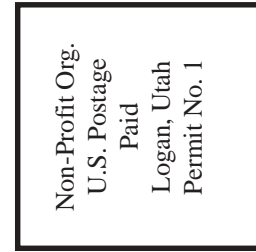
Phone: \_\_\_\_\_ Zip: \_\_\_\_\_

E-mail: \_\_\_\_\_

The registration fee if registering prior to or on January 21 is \$25.  
Registration after January 21 or at the door is \$35. Please make  
check or money order payable to **Utah State University**.

Send registration form and fee to the following address:

Darren McAvoy  
Utah Forest Landowner Education Program  
5230 Old Main Hill  
Logan, UT 84322-5230



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**EXTENSION**

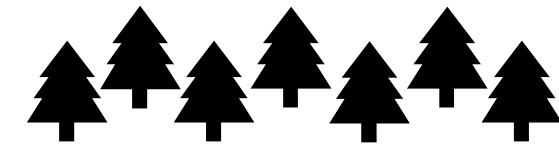
Private Forest Landowner Education Program  
College of Natural Resources  
Logan, Utah 84322-5230

# Forest Taxation and Estate Planning Conference

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January 28 and 29, 2003  
Washington County -  
Administration Building  
St. George, Utah

A workshop for forest landowners,  
accountants, attorneys, and  
natural resource professionals



Sponsored by:

Utah State University Extension  
Utah Division of Forestry, Fire and State Lands  
USDA Forest Service

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**UNIVERSITY**  
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## Forest Taxation and Estate Planning Conference

An important component of managing private forestland is managing the costs, income, and taxes associated with forestland. Properly managing your property's finances and taxes can make the difference between maintaining and dividing, or losing the property, either for you or your heirs. The conference speakers are among the very best in the nation for providing you practical insight to the Internal Revenue Code, and ways that it can be legally used to save you money. They are passionate about showing you how to hold on to what you have worked so hard for.

### Conference Speakers

Larry Bishop is the Forest Management and Taxation Specialist with the USDA Forest Service, State and Private Forestry, Southern Region, Atlanta, Georgia. He has 35 years of experience in forest management and taxation issues. Larry has a bachelor's degree in forest management and a master's degree in public administration.

John Greene is a Research Economist with the USDA Forest Service, Southern Research Station, New Orleans, Louisiana. He has a doctorate in forest economics and was formerly on the faculty at the University of Arkansas at Monticello. John's current work focuses on the effects of regulation and taxes on returns to private forestry.

Lloyd Casey is the Landowner Assistance Program Specialist, USDA Forest Service, State and Private Forestry, Northeastern Area. Larry has 36 years of experience in forest management and taxation issues. He holds a bachelor's degree in forestry.



### Tuesday, January 28: Forest Taxation

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Schedule: 8:30 am to 5:00 pm: lunch from 12:00 to 1:00 (on your own).  
Break refreshments will be provided.

#### Topics:

- Federal Income Tax & the Tax Process
- Establishment of Capitol Accounts
- Basic Record Keeping
- Reforestation, Amortization, & Tax Credits
- Passive Loss Rules & Expenses
- Cost Share & Conservation Payments
- Timber Sale Contracts & Income
- Depreciation & Section 179 Deductions
- Casualty & Other Timber Losses

### Wednesday, January 29: Estate Planning

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Schedule: 8:00 am to 11.30 am: Conference adjourns at noon.  
Break refreshments will be provided.

#### Topics:

- Why Estate Planning?
- Estate Planning Team
- Basic Record Keeping
- Kinds and Uses of Trusts
- Uses of Wills, Insurance, Co-ownership
- Special Use Valuation
- Exclusions
- Deferral and Extension of Estate Taxes
- Economic Advantages of Estate Planning
- Utah Estate Planning Specifics

### Conference Location and Directions



The conference room is on the lower floor of the Washington County Administration Building, 197 East Tabernacle, St. George, UT. From I-15 take Exit 6, go west (right if coming from I-15 South-bound) on St. George Blvd., go to 200 East, go left to the corner of 2nd and Tabernacle and park.

### Conference Registration



The registration fee on or before January 21, 2003, is \$25. After January 21, the fee is \$35. Please return the registration form provided soon, as space is limited. Your registration fee entitles you to all conference sessions, refreshments during morning and afternoon breaks, and a collection of hand-outs pertaining to conference sessions, including the *Forest Owners' Guide to the Federal Income Tax* and *Estate Planning for Forest Landowners*, both published by the USDA Forest Service.

### Hotel Accommodations



St. George has many hotels to choose from, here is a sample.

Name: Address: Phone

Best Western Abbey Inn: 129 S. Bluff: 888-222-3946

Best West. Coral Hills: 125 E. St. George Blvd: 800-542-7733

Budget Inn & Suites: 1221 S. Main St.: 800-929-0790

Comfort Suites: 1239 S. Main St.: 800-245-8602

Hampton Inn: 53 N. River Rd.: 800-892-1203

Holiday Inn: 850 S. Bluff: 800-465-4329

Ramada Inn: 1440 E. St. George Blvd.: 800-228-2828

Ranch Inn: 1040 S. Main: 800-332-0400

### For More Information Contact:

Darren McAvoy at 435-797-0560 or darrenm@cnr.usu.edu.

