

Ties to the Land

A Succession Planning Workshop

🌱 Lauren Grand, Forestry Agent



🌱 Nice to meet you!

We are the Leadership team, currently working on increasing access to the Ties to the Land Curriculum and Succession planning.



Lauren Grand



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Succession Planning

Many small landowners across the nation are reaching retirement age and are wondering how they can and should pass on their land or associated business in good shape for future generations.

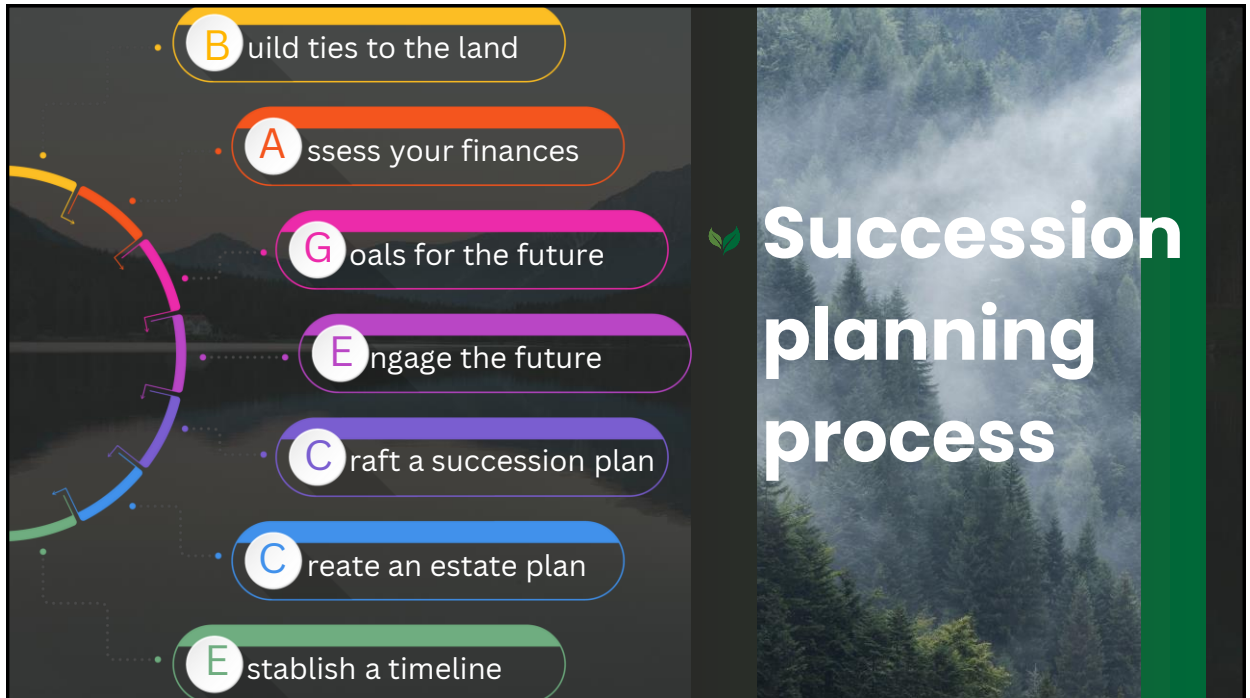


What is a succession plan?

A succession plan accounts for the social, financial and legal aspects of transitioning your land or business to future owners and managers.

A plan for the future for your land, business, loved ones and new owners or managers.





Succession VS Estate Planning



Succession planning considers the emotional and social aspects necessary for a smooth transfer of assets from one owner to another and is typically intergenerational.

Estate planning is a part of succession planning — it is the legal and financial details necessary for the transition of assets to occur. As you plan for succession, you must gather information critical for your estate plan.

🌱 The Real Cost of Succession planning

Having a plan and communicating openly alleviates stress and keeps all parties up to date and informed. Planning also helps you, your loved ones, and future owners and managers establish expectations about the transition so that the outcome minimizes hurt or resentful feelings after the transition.

Have. A. Plan.



🌱 Why succession planning matters

- Preserves your land, legacy, and values for future generations
- Prevents family conflict and legal disputes



- Allows time to educate and empower the next generation
- Avoids unintended consequences (like default state inheritance laws)

Succession Options

- Pass land to successors (family or others)
- Donate land to an organization
- Sell land (with or without restrictions)
- Use conservation easements



Passing the Land to Successors



- Successor: anyone you choose (not limited to family)
- Pass to one or multiple individuals
- Decide whether to divide or keep land undivided
- Ensure successors are prepared and engaged early

🌱 Donation Options

- Donate to land trusts, universities, or nonprofits
- Supports conservation, education, or community
- Work with advisors to navigate tax and legal implications
- Ensure organizational mission aligns with your vision



🌱 Selling the land

- Sell to a like-minded individual or organization
- Can generate income for heirs or charitable purposes
- May include stewardship or land-use conditions in the sale



Conservation Easements

- Permanent legal agreement to limit development
- Preserves ecological, agricultural, or cultural values



- Flexible terms (e.g., timber harvest allowed under conditions)
- May offer tax benefits (estate and income tax reductions)

Ties to the Land

- Succession planning framework for rural landowners
- Workbook + class format
- Focuses on social, emotional, legal, and financial issues
- Helps you take control of your land's future



Tools and Worksheets

Worksheet 1: Estimating the value of your assets

This worksheet asks you to estimate the value of your different assets. You may have more or fewer entries for some items than what is listed here.

REAL ESTATE* Use county assessments

DESCRIPTION, ADDRESS	Long Creek forestland, Long Creek Road, Some County, Oregon 97XXX	ACRES	XXX
RANGE/TAX LOT	XXXXXXXXXXXX	OWNING/EASEMENT	forestland
HOW ACQUIRED, DATE	Deeded from parents, 1/1/21	OWNERSHIP	Tenancy in common
% OWNERSHIP	100%	BIDS \$ (amount paid)	DEBT OBLIGATION \$ (amount owed)
		EST. VALUE/DATE \$	123,456, 1/01/21
DESCRIPTION, ADDRESS		ACRES	
RANGE/TAX LOT		OWNING/EASEMENT	
HOW ACQUIRED, DATE		OWNERSHIP	
% OWNERSHIP		BIDS \$	DEBT OBLIGATION \$
		EST. VALUE/DATE \$	
DESCRIPTION, ADDRESS		ACRES	
RANGE/TAX LOT		OWNING/EASEMENT	
HOW ACQUIRED, DATE		OWNERSHIP	
% OWNERSHIP		BIDS \$	DEBT OBLIGATION \$
		EST. VALUE/DATE \$	
DESCRIPTION, ADDRESS		ACRES	

13 interactive worksheets

•Topics include:

- Asset valuation
- Vision and goal setting
- Successor evaluation
- Meeting planning and follow-ups

•Designed to prepare you for conversations with advisors

Family Engagement and Communication

- Encourages one-on-one conversations with successors
- Includes guidance for holding effective family meetings



- Helps manage generational and personality differences
- Promotes respectful, honest dialogue and planning

Legal and Financial Preparation

Guides you to assemble and work with a professional advisor team



Overview of:

- Wills and trusts
- LLCs and partnerships
- Power of attorney
- Tax considerations

Flexibility and Customization

- Adapts to any family, land type, or ownership goal
- Encourages blended strategies (e.g., donate + heir succession)
- Supports long-term review and revision of your plan



Benefits of the Program

- Peace of mind
- Stronger family communication
- Clear, legally-sound transition plan
- Land protected and responsibly managed for generations



Get started today!

- Complete the workbook step-by-step
- Take the class - 10 classes in progress through the end of 2025
- Schedule meetings with your successors and advisors
- Visit www.tiestotheland.org for more tools and resources





Thank You

For Your Attention

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