

## Session 1: Friday August 26

When	What	Who
5:30 – 6pm	Registration Welcome & Introductions – Distribute VA Legacy Workbooks <ul style="list-style-type: none"> <li>• Program Welcome &amp; The Family Forest</li> </ul>	Southside Team members and Karen Snape, Gen NEXT Coordinator
<b>6:00 – 6:30</b>	<b>Dinner (Photo Story sharing)</b>	
6:30 – 7:30	Building the Base Options <ul style="list-style-type: none"> <li>• Legacy Primer Presentation</li> <li>• A Family Succession Story</li> </ul>	Jason Fisher Ebonie Alexander
7:30 – 7:40	<b>BREAK</b>	
7:40 – 8:05	Your Family & Woodland Legacy: The Heirloom Scale	Ties DVD - Sarah
8:05 – 8:15	Day 1 wrap-up <ul style="list-style-type: none"> <li>• Old McDonald Sold the Farm</li> </ul>	Jason
8:15 – 8:30	<b>Questions and DISMISSAL</b>	Sarah and Jason

## Session 2: Saturday, August 27

When	What	Who
9:00	Registration and light breakfast- Information perusal (handouts)/Meet and Greet	Southside Team Leaders
9:15 – 9:30	Ties to the Land DVD – “Cautionary Tales” Is Fair Always Equal?	Jason Fisher
9:30 - 10:15	Overview of planning components <ul style="list-style-type: none"> <li>• Ownership organization tools</li> </ul>	Maggy Gregory, Adams and Fisk, PLC
10:15– 10:45	Planning components continued – Conservation Tools	Sarah Parmelee, VDOF
<b>10:45</b>	<b>BREAK</b>	
10:55 – 11:45	Tax Implications for Planning Components New Tax Law Implications for Families	John Neal, Harris, Harvey, Neal & Co., LLP
11:45 – 12:15	Timber Basis Overview	Rick Hamilton, NCSU Emeritus and Mark Megalos, NCSU

<b>12:30 – 1:00</b>	<b>LUNCH</b>	
1:00 – 1:30	Recap of Planning Components - Best Preparations with open Q&A	Maggy Gregory
<b>1:30 – 1:40</b>	<b>BREAK</b>	
1:40 – 2:15	Landowner Panel with family stories: <ul style="list-style-type: none"> <li>• 2-3 landowners of varied estate planning experience</li> </ul>	Sarah Parmelee, moderator
2:15 – 2:30	Defining Your Legacy	Fisher/Snape
2:30 – 3:00	Advisors Forum Final Questions and Answers Evaluation, Challenge and Dismissal	Snape/Fisher/Parmalee and All team members

# **FOCUSING ON FOREST LAND TRANSFER TO GENERATION ‘NEXT’**

## **Presenter Bios 2022**

### **LILLIAN “EBONIE” ALEXANDER**

Ebonie is the current Executive Director of the Black Family Land Trust, Inc. (BFLT) whose mission is to provide educational, technical and financial services to protect and preserve African-American land ownership in the Piedmont region of North Carolina and Virginia. She has more than 25 years of senior management experience working in leadership positions with nonprofit organizations in the field of land-based community economic development and program design and implementation. She has proven to be particularly effective in building, brokering and managing relationships with and between public and private sector stakeholders at local, state and national levels.

Since joining the BFLT in 2009, Ebonie has designed and implemented the BFLT African American Land Ethic and Wealth Retention and Asset Protection (WRAP) programs. Each is a comprehensive intergenerational wealth retention program designed specifically to reduce the rate of African American land loss by educating landowners about strategies to build generational wealth by preserving land ownership.

Ebonie has degrees in Public Administration and Nonprofit Management. A proud Virginian who can trace her family’s history in the Commonwealth to 1767, she currently resides in Southside Virginia on land that has been in her family for six generations.

### **SARAH PARMELEE**

Sarah serves as the Forest Conservation Coordinator for the Virginia Department of Forestry’s Central Region, which includes 35 counties in the Piedmont and northern Blue Ridge of Virginia.

### **JOEL CATHEY**

Joel has served as Resource Manager for Ontario Hardwood Co., Inc., since 2000, which is a grade hardwood sawmill that procures wood over a large portion of Virginia and North Carolina. He currently manages approximately 20,000 acres of forestland in Virginia and West Virginia and himself is a forest landowner and Tree Farmer. He obtained a B.S. in Forestry from N.C. State University in 1980. Joel was employed from 1980-2000 by Chesapeake Corporation, St. Laurent Forest Products, and Smurfit-Stone

Container with numerous wood procurement and land management responsibilities in Virginia. He has been a member of the Society of American Foresters since 1980. He also is a member of the North Carolina Forestry Association and served on numerous committees including President. He has been a long-time member of Forest Resource Association's Policy and Operations Committee and Past Chairman for FRA's Appalachian Technical Division. Joel has served as instructor for numerous SFI Logger and Landowner Education classes. Joel and his wife own Long Branch Farms in Halifax, VA, of which their daughter and son-in-law are preparing to become Next Generation owners.

### **JASON FISHER**

Jason serves as Central District Senior Extension Agent in the 23-County Region of Virginia Cooperative Extension with 25 years experience. He brings leadership to sustainable forest and natural resources management research and techniques for landowners, loggers, professional foresters, and natural resource educators. Major projects include awareness and implementation of logging safety practices, timber and wildlife management, invasive plant and animal species management, forest and farmland transition, and value-added production of natural hardwood charcoal and non-timber forest products. Prior to his work in Extension that began in 1996 in Horticulture and later the 4-H Youth Program, he worked for Huber Engineered Woods. He has a B.S. degree in Forestry and Wildlife Sciences and Masters in Science and Education from Virginia Tech. He is a Fellow of the Virginia Natural Resources Leadership Institute, and a Certified Arborist through the International Society of Arboriculture. Jason lives in Halifax on a 50 acre Tree Farm with his wife Cindy and have two daughters, Libby and Malory who enjoy outdoor recreation on their land and surrounding areas. Jason also enjoys hobbies in taxidermy, hunting/fishing, and mentoring younger generations in the outdoors.

### **JOE GRAVES**

Joe is co-partner with brother Clark Graves in ownership of Graves Family Forests. Joe is the landowner representative to our committee and supports efforts with the landowner panel as well as working with a team of experts to help keep land intact, in the family, and in forest. Joe is a retired Naval Reserve Chief Petty Officer, a retired rural mail carrier, and a former Halifax County educator. He became interested in forestry in a Boy Scouts of America summer program. After graduating from the University of North Carolina at Chapel Hill with a degree in education, he and his bride, Sue, settled on a family farm in Halifax County. They began a family and along with his brother started thinking about the future on the farm for their families. After attending a

number of Virginia Cooperative Extension training sessions, they settled on forestry as a way to cover costs and provide a long-range financial base for an agriculture and forestry business. Their first pine trees were planted in the mid-1970's. In 2016-2017 they completed their largest timber harvest to date. Their children will be the fourth generation of the Graves family having begun in 1915 to own and care for the land and business.

### **MAGGY L. GREGORY**

Maggy is a partner in the law firm of Adams & Fisk, PLC, and maintains her primary office in Chatham. She received her undergraduate degree from the University of Virginia in 2005 and her juris doctor from the College of William and Mary in 2010. She is licensed in both Virginia and Maryland, and clerked for a trial judge on the Eastern Shore of Maryland and practiced in Danville prior to joining Adams & Fisk. She practices primarily in the areas of trust, estate and business succession and planning and advising, focusing on multi-generational and closely-held entity challenges. She is a past president of the Danville Bar Association and the current national chair of the American Bar Association's Agriculture Law subcommittee.

### **RICK HAMILTON**

Rick has extensive experience in forest landowner education through a 32-year tenure as Extension Forestry Specialist at NCSU. Rick received a Master's in Forestry from Duke, and BS in Forestry from Lycoming College. Rick is a North Carolina Registered Forester #799. He was recognized as a Fellow by the Society of American Foresters in 2003 and received the Henry Hardtner Award in 2006. Currently retired, Rick offers estate planning and landowner taxation advice as it pertains to timber harvesting and is a colleague of Jason's. He continues to assist NCSU with an annual Working Forestry Summit for landowners.

### **JOHN R. NEAL, CPA**

John is a senior partner with Harris, Harvey, Neal & Co., LLP, Certified Public Accountants and maintains an office in South Boston and Danville, Virginia. He graduated from Virginia Tech in 1984 with a BS in Accounting. In 1989, he obtained his CPA license from the State of Virginia. In December of 1989, he began working for Harris, Harvey, Neal & Co., LLP. His areas of expertise include: income taxation of individuals, corporations, partnerships, LLC's, trusts, and estates. He serves as partner-in-charge on numerous audits, reviews, and compilations for various business entities and non-profit organizations. John is a member of the American Institute of Certified Public Accountants. He is also a member and former director of the Virginia

Society of CPAs. Also, he has served as a past president of the Piedmont Chapter of the Virginia Society of CPAs. He currently resides in Pittsylvania County.

### **JONATHAN V. WRIGHT, CPA**

Jonathan is a partner with Harris, Harvey, Neal & Co., LLP, Certified Public Accountants and maintains an office in South Boston and Danville, Virginia. He graduated from Lynchburg College in 2009 with a bachelor's degree in Accounting and earned a master's degree in business administration in 2010. In 2011, he obtained his CPA license from the State of Virginia. In July of 2014, he began working for Harris, Harvey, Neal & Co., LLP. His areas of expertise include: income taxation of individuals, corporations, partnerships, LLC's, trusts, and estates. He serves as partner-in-charge on numerous audits, reviews, and compilations for various business entities and non-profit organizations. Jonathan is a member of the American Institute of Certified Public Accountants. He is also a member of the Virginia Society of CPAs. He currently resides in South Boston, Virginia.

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**Central District Presenter Contact Information**

**LILLIAN "EBONIE" ALEXANDER**

Executive Director  
Black Family Land Trust, Inc.  
307 W. Main Street, PO Box 2087  
Durham, NC 27701-3215  
Office: (919) 683-5263 Ext. 201  
Mobile: (434) 247-9500  
Fax: (888) 585-9139  
[ebonie@bflt.org](mailto:ebonie@bflt.org)  
<http://www.bflt.org/index.shtml>

**SARAH PARMELEE**

Forest Conservation Coordinator  
Virginia Department of Forestry  
Central Region  
900 Natural Resources Drive, Suite 800  
Charlottesville, VA 22903  
Phone: 540-290-7153  
[sarah.parmelee@dof.virginia.gov](mailto:sarah.parmelee@dof.virginia.gov)

**JOEL CATHEY**

Resource Manager, Ontario Hardwoods Inc.  
3828 Horseshoe Bend Rd.  
Keysville, VA 23947  
Office: (434) 736-9291  
Mobile: (434) 395-8748  
[joelcathey@hotmail.com](mailto:joelcathey@hotmail.com)

**JASON FISHER,**

District Extension Agent, Forestry and  
Natural Resources – Central District  
Virginia Cooperative Extension, Halifax  
County Office  
P.O. Box 757 Halifax, VA 24558-0757  
Office: (434) 476-2147  
Fax: (434) 476-7777  
[jasonf@vt.edu](mailto:jasonf@vt.edu)  
<http://offices.ext.vt.edu/halifax/>

**JOSEPH GRAVES**

Co-owner, Graves Family Forests  
1072 Calvary Rd.  
Alton, VA 24520  
Phone: (434) 434-822-8967  
[gmcgraves@hotmail.com](mailto:gmcgraves@hotmail.com)

**MAGGY GREGORY, ESQ.**

Adams & Fisk, PLC  
2. N. Main Street  
P. O. Box 59  
Chatham, VA 24531  
Phone: (434) 432-2531  
[maggy@adams-fisk.com](mailto:maggy@adams-fisk.com)

**RICK HAMILTON**

NC State University Extension Specialist,  
Emeritus  
Timber Taxation  
[ncrf799@gmail.com](mailto:ncrf799@gmail.com)

**JOHN R. NEAL, CPA**

Senior Partner  
Harris, Harvey, Neal & Co., LLP, CPA's  
P.O. Box 754  
554 North Main Street  
South Boston, VA 24592  
Office: (434) 575-7914  
Fax: (434) 575-6850  
Mobile: (434) 250-6174  
[jrn@hhncpa.com](mailto:jrn@hhncpa.com)

**JONATHAN V. WRIGHT, CPA**

Harris, Harvey, Neal & Co., LLP  
P.O. Box 754  
554 North Main Street  
South Boston, VA 24592  
Office: (434) 575-7914  
Fax: (434) 575-6850  
Mobile: (434) 471-1803  
[jvw@hhncpa.com](mailto:jvw@hhncpa.com)



# Focusing on Land Transfer to Generation “NEXT”

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