

SEMINAR NOTICE

Successful farm succession

In a field OF your own, but not ON your own

Farming is a distinctive business, and each farm succession is unique to those involved in the process. At the same time, an understanding of common best practices with tax and estate rules can help to make your succession ... a success.

We'll help you look into key issues:

- Why do we see farm succession as unique?
- What principles should guide decisions?
- Is your estate planning foundation firm?
- Are you clear on current tax rates?
- Special tax rules for farming activities
- Eliminating tax on farm dispositions
- Deferring tax on transfers to family
- Delaying tax on sales to family

Date **Wednesday, October 24, 2018**
Welcome **5:30 PM**
Seminar **6:00 PM to 7:00 PM**
Location **Wainfleet Branch**
31885 Hwy #3
Wainfleet ON

Meridian Hosting Branch:
Wainfleet

Wealth Team Host:
Kelly Spencer

Light refreshments will be served.
Space is limited so please contact your
Meridian branch to reserve a seat, or call:

905 899 3130 ext. 7900



Guest Speaker: Doug Carroll BBA JD LLM(Tax) TEP CFP

Doug is the Meridian *Practice Lead* for tax, estate and financial planning. He previously ran an estate planning law practice, and was a consultant with a life insurer and a mutual fund provider. Doug has spoken on hundreds of seminars and conferences, and writes and has been quoted in *Globe & Mail*, *National Post*, *Global Television*, *CTV News*, *BNN*, *Toronto Star*, *680News*, *Yahoo Finance*, *Advisor.ca*, *Advisor's Edge Reports*, *Investment & Insurance Journal*, *Investment Executive*, *Advocis Forum* and *Sirius XM Radio* – and people still say he “actually speaks English when he speaks law.”

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