



## *Happy Easter and Passover:*

The Capitol is closed down this week for Spring Break, but MSRPO is still pushing ahead to offer value to our members.

MSRPO and MSRPO Member Frank Heers of Heers & Heers Attorneys at Law will be hosting three COMPLIMENTARY seminars on Legacy Issues at the Hilton Airport Hotel, 3800 American Blvd. E. in Bloomington:

- \* Tuesday, April 14th, 10:30 - 12:00 noon
- \* Tuesday, April 14th, 7:00 - 8:30 p.m.
- \* Thursday, April 16th, 7:00 - 8:30 p.m.

REGISTER TODAY — call 651.641.0001 or [click here](#).

MSRPO has long focused on property tax issues. Why the interest in legacy issues? The answer is that we know that these issues are important to our members.

The National Woodland Owner Survey, completed last year, reveals:

Top Concerns of Family forest owners

- 1) Keeping land intact for heirs
- 2) Trespassing/poaching
- 3) High Property Taxes
- 4) Misuse of woodlands (e.g. dumping)
- 5) Insects or plant diseases

In 2008, the Pinchot Institute for Conservation completed a study looking at the needs of the next generation in Wisconsin. Here is an excerpt from the Executive Summary:

*"The first of its kind statewide offspring study conducted by the Pinchot Institute for Conservation found that the majority of offspring of Wisconsin family forestland owners are not connected to the land; have not been involved in the management of the land (female offspring far less than male offspring); but still expect to inherit the land from their parents. They believe their parents will require them to jointly manage the family forests with their brothers and sisters – potentially posing real challenges as these siblings already demonstrate some high levels of internal disagreement on important aspects of managing the family forests (i.e. generating income from the land; determining what conditions might force them to have to sell some or all of the family forests).*

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*the top of their list as the key condition to maintaining forestlands in family hands. And new to the discussion of keeping forests as forests, both male and female offspring in Wisconsin fear that lack of access to funds to pay for major medical expenses (not taxes) would more likely force them to have to sell the family forests.*

*Sibling disagreement may already be more advanced than one might think. Exhibit B of this executive summary provides an overview of sibling agreement/disagreement. According to survey results, siblings were most in agreement on what will happen to the land at transfer time (they agreed that they would inherit the land), but 50 percent or more families with multiple children interviewed for this study had siblings who disagreed with each other in at least four critical areas:*

- a) wanting to be involved in the management of the family forest prior to land transfer;*
- b) knowing how the family forestlands will be transferred (joint sibling ownership? Divided among siblings? Single sibling ownership? Even though overall offspring believed they would jointly own the land, multiple siblings within the families that were part of the study did not agree on this); and*
- c) identifying what conditions would force them to sell the family forests; and*
- d) identifying payment (\$) for biomass removal as an important or very important financial tool to help manage the family forests.*

*These four factors are fairly significant benchmarks in gauging how smooth land transfer and next generation forestland management will occur. Forget tax relief, spouses agreeing, and kids agreeing — according to survey results at the end of the day siblings being able to agree with each other on what to do with the family forests trumped the whole lot on what's important to the this next generation."*

Two things are very clear — most cabin or hunting land owners want to leave their places to their children, and intend to do so in the next decade. But there is little agreement between the kids as to what will happen after that. Survey results show that almost a third of parents have not even discussed legacy issues with their children. For those who have discussed the future of the family land with their children, there are surprising results. When researchers asked the next generation "How will the land transfer?" there is an incredible 52 percent disagreement between siblings. Forty-one percent of siblings have not discussed jointly owning the land.

Given this, MSRPO thought legacy issues deserved some attention. MSRPO member Frank Heers is an expert in the field and can lead others to a positive solution for passing on the family land. Register today!

Sincerely,



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Not a member of MSRPO? [Click here](#) to join our mailing list. Together, we can protect the family lake place from confiscatory property taxes.

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