

Addressing Intergenerational Transfer

USDA Forest Service
Northeastern Area
State and Private Forestry



Who will inherit your family forest?

Description:

In response to an anticipated tidal wave of intergenerational land transfer, with a high likelihood to result in increased parcelization and fragmentation of family forest land, and the loss of values and societal benefits that would result, the Northeastern Area (NA) has launched an effort to provide current and future landowners with information and tools to help them plan for intergenerational transfer, and to ensure that the stewardship and legacy goals of the future generation of owners are not lost when the land changes hands.

Key Issues:

- NA's Strategic Plan recognizes Sustaining the Productive Capacity of privately owned forest land as a high priority. When land is subdivided into smaller pieces, that capacity is often lost.
- NA and the Northeastern Area Association of State Foresters are cooperating in the Investing Where It Matters Most (IWIMM) process, which identifies working with Family Forest owners to mitigate fragmentation and parcelization as an issue of high concern.
- To address this, IWIMM tasks include promotion of greater communication around the topic of intergenerational transfer.
- 44% of our nation's family forest land is owned by people over the age of 65 years.
- As that generation of landowners passes away, we will be facing the largest intergenerational transfer of forest land in our nation's history.
- Discussions about the eventual death and distribution of the estate of the current generation can be distressing and many tend to avoid the topic.
- Heirs of current family forest landowners are: less connected with the land; not likely to live on the land in the future; and very often lack prior involvement in management decisions. Without proper planning and family discussions, increased fragmentation and parcelization is the likely outcome.

Accomplishments:

- Media outreach on the Next Generation topic.
- Substantial topic-related updates to the NA website (www.na.fs.fed.us/stewardship/estate/estate.shtml).
- Planning for a staffed display booth—themed on the Next Generation of Forest Landowners—at the
 - 2007 National Association of Conservation Districts (NACD) NE Regional Meeting (underway)
 - 2007 American Association of Retired Persons National Conference, Boston, MA
 - 2007 National Tree Farm Convention, Madison, WI
- Filming a 30-second Public Service Announcement on Forest Ownership and Estate Planning.
- Preliminary planning for articles in *Tree Farm* magazine; *Journal of Forestry*; *NACD Forestry Notes*; *Society of American Foresters (SAF) Forestry Source*; *National Wild Turkey Federation (NWTf) Get in the Game*; other.
- Preliminary planning for Train-the-Trainers outreach.

Budget History: To date, this effort has involved only modest funding, primarily for travel to various meetings at which a display has been staffed.

Future Direction:

- Staff the Intergenerational exhibit at the 2008 National NACD Meeting, Reno, NV
- Staff the Intergenerational exhibit at the 2008 NWTf Meeting, Atlanta, GA

- Targeting two articles in Tree Farm magazine; *Journal of Forestry*; *NACD Forestry Notes*; *SAF Forestry Source*; *NWTF Get in the Game*; other, in FY2008.
- Targeting delivery of three Train-the-Trainers sessions in FY2008.

Kathryn Maloney, Director
11 Campus Blvd., Suite 200
Newtown Square, PA 19073
610-557-4103 (4177-FAX)
kmaloney@fs.fed.us
<http://www.na.fs.fed.us>

Robin Morgan, Asst. Director
11 Campus Blvd., Suite 200
Newtown Square, PA 19073
(610) 557-4124 (4136-FAX)
rmorgan@fs.fed.us

Mark Buccowich, Landowner
Assistance Program Leader
11 Campus Blvd., Suite 200
Newtown Square, PA 19073
(610) 557-4029 (4136-FAX)
mbuccowich@fs.fed.us



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