



## Planning for a Secure Future: The Financial and Legal Fundamentals of Farming

Saturday, Jan. 26<sup>th</sup> 11:30am

### ***About the Session:***

Join a panel of financial and legal professionals as they share some of the fundamental tools that farmers and ranchers can use to prepare for a successful future. Teresa Campbell, CPA; Financial Planner, Lisa Isaacson; and Attorney, Jim Plumhoff will review many simple steps that farmers and ranchers can take to avoid pitfalls while planning, operating, and transitioning their businesses. Questions will be addressed such as: Is your business structured optimally? How can you minimize taxes and streamline accounting? How can investments leverage resources and protect the future?

### ***About the Speakers:***

**Lisa Isaacson** CPA/PFS, CFP, is Vice President and Client Executive for Alpine Bank Wealth Management, recently transitioning from Elderado Financial in Montrose. Lisa spent over 25 years in the accounting field working in a variety of industries. She expanded her focus by transitioning into financial planning/wealth management three years ago and combined her CPA experience with financial planning to help individuals and businesses achieve their goals.

Lisa is a member of the American Institute of Certified Public Accountants and the Colorado Society of CPAs. Lisa earned a bachelor of science in accounting from Mankato State University. She is preparing for the Certified Financial Planner exam.

Being raised on a farm instilled a strong work ethic and ability to relate to client needs in rural Western Colorado. Lisa is active in the Montrose community serving as secretary of the Montrose Woman's Club and treasurer of the Montrose Summer Music Series. She serves on the HopeWest Planned Giving Council and is the past Treasurer of the Valley Food Partnership.

**Teresa Campbell** is a Columbine High School graduate. She graduated Magna Cum Laude from the University of Colorado at Denver with a Bachelor of Science degree in Business Administration with an emphasis in Accounting in 1992. She went on to obtain a Master of Science in Accounting in 1994, also from the University of Colorado at Denver while working in the accounting industry. She then started her own public accounting

practice in Montrose, Colorado. In 2009 she became a Certified Forensic Accountant. She is a Certified Public Accountant in Colorado and a member of the American Institute of Certified Public Accountants, the Colorado Society of Certified Public Accountants, and the American Board of Forensic Accounting.

Teresa is proficient in all areas of taxation, but specializes in tax and consulting services for multi-entity family businesses, including farms/ranches. In addition, she has a great deal of experience in all aspects of estate administration. She and her husband Jeff own and operate a ranch near Montrose, Colorado.

**Jim Plumhoff** grew up on a beef cattle farm on the east coast. I spent most of my life in Virginia and have an undergraduate degree in Agriculture and Animal Science from Virginia Tech. I have worked on a variety of agriculture operations including, dairy, poultry, crop and cattle ranches in Virginia, Montana, and Colorado before and during my educational years. In addition to a Bachelors of Science, I have a law degree from the University of Richmond and a Masters of Business Administration from the University of Texas in San Antonio. I practice in the areas of agriculture, business, estate planning, and other general law practice areas. I was a partner in a Virginia law firm for seven years prior to moving west. My wife Sara and I settled in Montrose in 2011 as we felt it would be a great place to raise our family. We have two children, ages six and eleven. I have been coming to western Colorado for over 20 years to hunt and fish each fall. I am currently a partner and owner of Devor and Plumhoff, LLC.

[jim@coloradowestlaw.com](mailto:jim@coloradowestlaw.com)