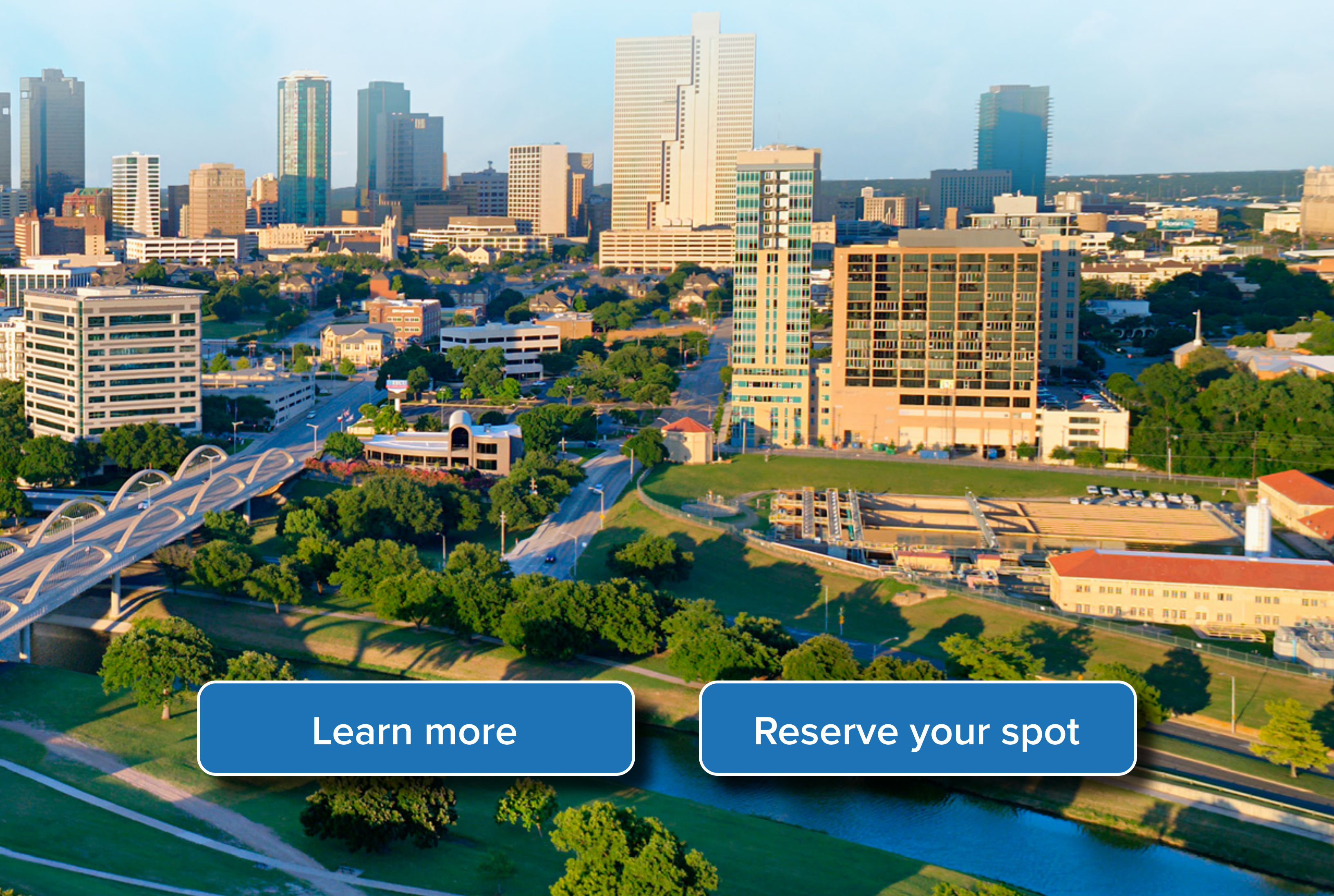
Your Legacy Starts Here

A Family Succession Planning Bootcamp

January 21-22, 2026
Sheraton Fort Worth Downtown
Fort Worth, TX



Learn more

Reserve your spot

The most difficult part of securing your farm's legacy is often taking the first step. Jumpstart your succession plan and join Pinion for an immersive, two-day workshop set in the heart of downtown Fort Worth. Your family will learn from and work with our expert advisors to develop personalized and actionable strategies for succession and estate planning.

This workshop condenses months of planning and advisor discussions into two days — equipping you with the foundational steps to begin your succession plan and create a 90-day action plan to guide your next steps.

To truly benefit from and maximize your succession planning experience, we ask that you **bring at least two generational family members** from your operation. You'll take part in a mix of group educational sessions led by Pinion, private consultations with advisors, and hands-on working sessions with your family.

Learn From Our Industry Experts

Seize the opportunity to learn from and collaborate with Pinion's leading ag experts, all gathered in one location. You'll receive insights and training in a supportive, small group atmosphere alongside other family farming operations. Advisor areas of expertise include:

- Family Business Advising
- Next Generation and Succession Planning
- Estate, Trust, and Gifting Tax Strategy

Get Actionable Takeaways

Prior to the event, you'll receive a binder containing fillable worksheets to complete onsite. In just two days you'll walk away with:

- A clear picture of your current and proposed entity structure
- A high-level overview of your tax exposure and planning opportunities
- Defined guiding principles to anchor family decision-making
- A clarified vision for your family's long-term goals
- Practical guidance for engaging with legal counsel
- A roadmap draft for succession planning and leadership transition
- Tools to kickstart family business governance
- Personalized insights from expert consultations
- A prioritized action plan for the next 90 days

Focus on What's Ahead: Agenda Overview

Here's a preview of at what you can expect during your two full days at the active workshop. This includes a mix of educational group sessions, personal coaching, and interactive family workshops with built-in breaks and family huddles to help you recharge and regroup throughout the day.

Day 1: Wednesday, 1/21/26

8AM – 5PM

**Note that schedule is subject to change.*

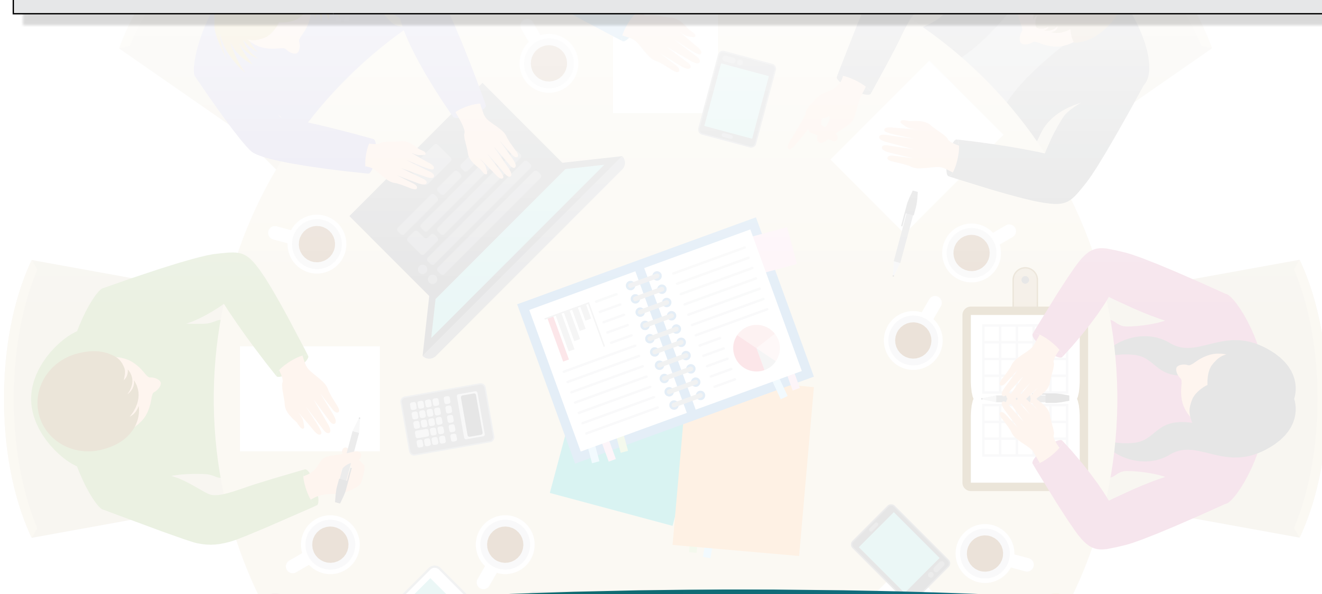
Topic	Description
Breakfast	Onsite breakfast provided by Pinion.
Introduction	Welcome and introduction to advisors and sessions.
Family Business Fundamentals	Explore the 3-circle model, business lifecycle, and importance of a shared vision in this group session.
Family Huddle	Discuss and complete your vision worksheet and goals with your family.
Guiding Principals	Receive an introduction to values-based planning and how it shapes decision-making in this group session.
Family Huddle	Complete guiding principles in this family working session.
Lunch	Onsite lunch provided by Pinion.
Estate Planning 101	Walk through various estate planning scenarios and tools in this group session.
Family Huddle	Define your estate/tax position in this group session and prepare for day two consultations.
Entity Structure Overview	Review common structures, identify inefficiencies, and prepare for feedback in this group session.
Recap	Submit pre-consultation materials and preview day two consultations in this group session.
Happy Hour	Optional happy hour with light hors d'oeuvres and drinks, hosted by Pinion.

Day 2: Thursday, 1/22/26

7AM – 5PM

**Note that schedule is subject to change and start/end times will differ for each operation. Your schedule will be determined after registration and after we discuss your areas of interest.*

Topic	Description
Breakfast	Onsite breakfast provided by Pinion.
Introduction	Welcome and review of schedule for day two.
Rotating Private Family Consultations	Meet with a family business advisor, estate planning advisor, tax advisor, and/or strategic planning advisor, depending on your operation's needs.
Lunch	Onsite lunch provided by Pinion.
Wrap Up	Families pair up to share takeaways and next steps. Conclusion provided by Pinion.
Dinner	Optional dinner with consultants for continued discussion or Q&A.



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Your Family Business and Next Gen Planning Team

Get to know the experts who will lead and support you throughout the workshop.

Family Business Guidance

Davon Cook – Family Farm Business Advisor
Davon grew up on her family's cotton farm and became devoted to building and securing the legacies of other farm families through succession planning and peer group networks. Guiding families to co-create vision, strategy, and roles across generations, Davon expertly navigates interpersonal dynamics and business growth for family businesses.

Lance Woodbury – Family Farm Business Advisor
As a recognized Fellow of the Family Firm Institute, Kolbe Consultant, and published author, Lance's seasoned experience guides farm families through the strategic and emotional complexities of succession — with a focus on family governance, communication, and transitional leadership. His own upbringing on his family farm ignited a passion to preserve farm legacies with education and coaching.

Ethan Smith, CFBA certified – Family Farm Business Advisor
Ethan helps family- and closely-held agribusinesses define a clear path forward by linking ownership and management goals with long-term planning. Drawing on his production-ag background — from row crops and hay to a commercial cow-calf herd — and years of experience managing farms, Ethan guides ownership and succession strategy with clarity and purpose.

Emma Swainston, CFBA certified – Family Farm Business Advisor
Growing up on a dairy and row crop farm in Indiana, Emma gained a deep appreciation for the complexities of family-owned ag operations. Certified in Family Business Advising, she guides family-run agribusinesses through the complex conversations and informed decisions needed to secure their farm's legacy.

Becca Simmonds – Family Farm Business Advisor
Dedicated to helping agribusinesses thrive, Becca provides guidance to create a plan when there's no clear path forward. She leads strategic planning sessions that empower teams to step out of the day-to-day and focus on building for the future by helping teams gain clarity, build momentum, and prioritize what matters most.

Next Gen & Succession Strategy

Jim Rein, CPA – Lead Next Gen, Estate & Succession Advisor
With experience in consulting, taxation, and advisory services for family-owned businesses, Jim specializes in simplifying the estate and succession planning process — guiding families through steps to minimize risks, protect assets, increase equity, reduce tax burden, and avoid probate court.

Garrett Baker – Next Gen Farm Advisor
Specialized in helping family farms transition to the next generation in a tax-efficient manner, Garrett guides farm families through the intricacies of farm management and succession planning with strategic and tailored guidance. Growing up in a family-owned Ag retail business provided him with unique insights of agribusiness challenges.

Estate & Tax Planning

Kevin Bearley, J.D. – Estate & Succession Planning Advisor
Kevin contributes deep technical knowledge in estate structuring and tax strategy, helping farm families design plans that minimize risk and tax exposure while aligning with their long-term goals. He is an experienced tax attorney with a passion for preserving and protecting farm and ranch legacies.

Keaton Dugan, CPA – Lead Agribusiness Advisor, Commodity Crops
As a specialized tax strategist and advisor, Keaton helps producers navigate complex financial challenges. With a trained eye on long-term business strategy, he provides tailored solutions for estate and succession plans. As a key player in his own family's legacy farm, Keaton is passionate about protecting the future of farming operations.

Chris Pfannenstiel, CPA – Agribusiness Advisor
Chris specializes in tax, financial, and estate planning tailored to ag operations. His first-hand farming and ranching experience — understanding the challenges, complexities, and hard decisions of Ag operations — provides him with the motivation to ensure that producers, their families, and their operations thrive well into the future.

Reserve Your Spot

Limited spots are available so reserve your place today! Note that at least two generational family members in the operation must attend to fully benefit from the advantages of this unique family workshop.

Cost and Registration

Registration is open. Secure your place today.

» **Advance rate through December 15, 2025: $5,000**

Your registration fee guarantees spots for you and your designated family members at this hands-on, in-person workshop, guided by top professionals in every facet of succession planning.

Registration also includes:

» Breakfast and lunch on both days

» Happy hour hosted by Pinion (day one)

» An exclusive welcome gift

» A deposit towards a succession or estate planning project: You pick what matters most to you and we'll apply the registration fee towards your next step with our team.

We hope you're able to join us for what will be an unforgettable and transformative experience!

Venue Location

Pinon's family succcession and estate planning bootcamp will be held at:

Sheraton Fort Worth Downtown
1701 Commerce Street, Fort Worth, TX 76102
1-817-335-7000

Book Your Hotel
A room block has been reserved at the Sheraton Fort Worth Downtown at the rate of $195/night. To complete your online reservation, visit: **Reservation-Link** or call 1-817-355-7000 and reference the 'Pinion Family' group.

View FAQs | Reserve

Contact Us With Questions

Please reach out to Becca Simmonds with any questions.

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