



# Succession Planning Workshop

*January 20, 2025*



*Brought to you by:*  
*Colorado Cattlemen's Agricultural Land Trust*  
*Colorado Cattlemen's Association*

*Colorado Cattlemen's Association*  
*2025 Mid-Winter Conference*

# Succession Planning Workshop Agenda

Dan Skeeters, Colorado Cattlemen's Agricultural Land Trust  
Welcome and Introduction

Keven and Sandi Turecek, Stacked Lazy Three Ranch  
Succession Planning: One Family's Journey

Jeff Tranel, Colorado State University Extension  
Family Dynamics in Succession Planning

Jenna H. Keller, Keller Law, LLC  
An Overview of Estate and Succession Planning

Cliff Polk, Rocky Mountain Financial Group  
Case Studies of Good and Bad Outcomes in Succession Planning

Scott Pilchard, Western Skies Advisory  
Turning Conservation Into Cashflow

Q&A  
30 minutes to ask questions of the panel

One-on-one meetings (3:00 to 4:00 PM)

After the workshop, attendees will have an opportunity to briefly meet with the panelists to get acquainted and exchange contact information. Please limit these interactions to 5 minutes as others may be waiting.

# 10 Key Steps in Farm or Ranch Transfer



Succession is not a linear process. You may move forward and backward several times before the process is complete.



Understand your values, vision and goals



Identify your needs



Assess your finances



Create your support team



Choose which tools you will use



Identify and strengthen key relationships



Outline and adapt your plan



Be prepared to share your story



Negotiate



Finalize documentation

# Meet Our Guest Speakers

## Sandi and Keven Turecek

Stacked Lazy Three Ranch  
Deer Trail, CO



The Turecek family has owned Stacked Lazy Three Ranch near Deer Trail on Colorado's eastern plains since 1980 and are now transitioning to the next generation. Their ranch is comprised of land bought from both sides of the family as well as from neighbors.

Keven and Sandi have four children, and the youngest son, Ty and his wife Page, chose to remain on the ranch. They are now raising two little cowboys who are the 4th generation on the ranch. Ty brings a modern approach to

ranching while respecting the traditions passed down from his parents and grandparents. Page, a strong partner in both marriage and ranch life, is equally committed to raising their boys with the same values of hard work faith and perseverance.

The Turecek family's story is not just one of survival but of flourishing against the odds. It's a story of grit, faith, and resilience. They remain dedicated to preserving the legacy built by those before them, ensuring that the ranch will continue to thrive for future generation to come.

## Jeff Tranel    Agricultural and Business Management Economist Colorado State University Extension



Jeff's professional interests focus on estate and succession planning and managing farm/ranch finances, income taxes, and human resources. During his 40-year career, Jeff Tranel has addressed agricultural audiences and worked with over 10,000 farm families throughout the United States and nine countries. His research, speaking engagements, and authorship focus on helping farm and ranch families better understand and manage their risks. He has coached numerous families through all estate and succession planning phases. Jeff also provides expert testimony for agriculturally related court cases.

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## Jenna H. Keller

Estate Planning Lawyer, Keller Law, LLC



Jenna H. Keller is the owner and manager of Keller Law, LLC that is committed to the representation of farmers and ranchers throughout Colorado, western Nebraska and southern Wyoming for the legal needs in the areas of estate planning, probate, oil and gas, wind/solar, conservation easements, water rights, tax, real estate and civil litigation. Ms. Keller advises in the areas of estate and succession planning with the distinct goal of ensuring the succession of on-farm and on-ranch heirs. Ms. Keller comes from a wheat farming background as a native of northeastern Colorado and currently resides in northwestern Colorado.

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## Cliff Polk

Chartered Life Underwriter  
Rocky Mountain Financial Group



Cliff is the founder and co-owner of Rocky Mountain Financial Group in Denver, Colorado. He has 30 years of experience working with business owners, regarding their estate and business planning. He has many years of experience, working with farmers and ranchers in Colorado, Nebraska, and Wyoming. Cliff understands the uniqueness of succession planning in the agricultural community and the importance of maintaining family farms and ranches, in the hands of Ag producers. "Estate Planning is not just about taxes, it's about people, you and your family!" Cliff Polk and Rocky Mountain Financial Group are uniquely positioned to be a valuable resource for the Ag Community.

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## Scott Pilchard

Founder, Western Skies Advisory



Scott Pilchard is the founder and principal of Western Skies Advisory, in Scottsdale, Arizona. He provides financial guidance to farmers, ranchers, and other agricultural enterprises across the West, focusing on ownership and management succession for these family businesses. Out of the office, Scott is a member of the Board of Trustees of the Arizona Agriculture Education/FFA Foundation, an alumnus of The Arizona Center for Rural Leadership, served as an Honorary Commander of the 56th Comptroller's Squadron at Luke Air Force Base, and serves thousands of BBQ meals each year at community events as part of the Arizona Farm Bureau's Grill Team.

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One-third of all U.S. agricultural land (about 330 million acres) is expected to change hands in the next 20 years making farms and ranches vulnerable to conversion and development. Effective succession plans will provide enormous benefits toward keeping working lands in the working hands of Colorado agricultural producers.



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Land Transfer Navigators Lead  
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Conserving Colorado's Western heritage and working landscapes for the benefit of future generations

***From One Generation to the Next***