

THINK LIKE A TREE
Family Forest Foundation
2005 Open House
August 6th 2005

Forest Grange
3397 Jackson Hwy.
Chehalis, WA 98591
8:00 AM – 3:00 PM

Seating is limited and participants are requested to RSVP either by phone at 360-345-1023, mail to Family Forest Foundation, PO Box 1364, Chehalis, WA 98532 or e-mail at contact@familyforestfoundation.org

8:00 - 8:45 AM	Coffee, Tea, donuts etc	
8:45 - 9:00 AM	Introductions and Overview	Steve Stinson
9:00 - 9:15 AM	Financial Planning	John Grant
9:15 - 9:30 AM	Estate Planning 101	Sharon Rocket
9:30 - 9:45 AM	Tax Considerations	Tom Bradley
9:45 - 10:00 AM	Legal Issues	Cynthia Worth
10:00 - 10:15 AM	Case Study #1 Family Limited Partnership	Steve Webster
10:15 - 10:30 AM	Case Study #2 Family Limited Partnership	Doug Stinson
10:30 - 10:45 AM	Case Study #3 Charitable Giving	Nancy Hales
10:45 AM	Overview/Breakout	Steve Stinson
11:00 - 11:30 AM	Break-Out Sessions with Panelists	
11:30 - 12:00 PM	Q and A with Panel	Steve Stinson Moderator
12:00 - 1:00 PM	Catered Lunch	
1:00 - 3:00 PM	Family Forest Foundation Update by the Board Members	
3:00 PM	Closing Remarks – Thank You	Rick Dunning, WFFA Steve Stinson, FFF

**2005 Family Forest Foundation Open House
Speaker Biographies**

John C. Grant

First Vice President – Investments

john.c.grant@smithbarney.com

Tel: 253 924 9995

Toll Free: 800 533 5660

Fax: 253 924 9999

Business Experience

1993 – Present: Smith Barney

First Vice President – Investment
Federal Way, WA

1981-1993: Plum Creek Timber Company

Manager – Timber Inventory

Seattle, WA

Education and Licensing

Master of Business Administration, 1990

Pacific Lutheran University

Tacoma, WA

Masters of Science, 1980

University of Washington

Seattle, WA

Bachelor of Science – Forestry, 1975

Texas A & M

College Station, TX

Series 7 – General Securities Representative

Series 63 – Uniform State Exam

Series 65 – Investment Advisory Agent

Life & Variable Annuity Insurance Licensed

Long Term Care Insurance Licensed

Associations:

Investment Management Consultants Association

Association of Professional Investment Consultants (APIC)

Services

529 Plans

Alternative Investments

Asset Management

Estate Planning

Family Consulting

Financial Planning

Fixed Income

Insurance Companies
Lending Services
Long Term Care Insurance
Municipal Bonds
Philanthropic Services
Qualified Plans
Retirement Planning
Trust Services and Accounting
Wealth Management

Honors and Recognitions

President's Council
Smith Barney

Community Foundation for Southwest Washington

NANCY E. HALES

President

1053 Officers' Row
Vancouver, WA
98661
360-694-2550
nancy@cfsww.org

EXPERIENCE

Ms. Hales is a **community leader** whose emphasis has been on promoting local philanthropy. As the President of the Community Foundation for Southwest Washington, she has built the organization from a fledgling \$2 million charity to a \$44 million public foundation, distributing over \$5 million per year in grants and gifts to the community and region.

Under her leadership, the CFSWW initiated a planned giving program that quickly grew to over \$7 million in charitable trusts, and gift annuities. This success has earned her the **respect and trust of the region's estate planning community**. She proactively advises Congressional committees on certain issues affecting charitable tax law. She has presented to both the Clark County Bar Association and the Southwest Washington Estate Planning Council.

Ms. Hales is an **effective executive officer**, as demonstrated not only by her abilities to build the CFSWW in prosperous times, but also through the leaner times as well. Throughout her 14 years as CEO, the CFSWW has posted positive growth, and has met all of its key organizational objectives. Most important, her organization continues to innovate, providing enhanced programs for its constituents and the community

Ms. Hales's past experience includes 6 years as **the Executive Director of the Emergency Services Department for Skamania County**, managing the emergency planning activities for a multi-jurisdictional planning agency. She served for 8 years as the **Vice-chair of the bi-state planning body, the Columbia River Gorge Commission**, overseeing the drafting, adoption, and implementation of a management plan for the first ever National Scenic Area in the country.

Before that, Ms. Hales was the **Administrative Officer for a US Forest Service** district office, managing its \$3million budget, and supervising administrative services, including human resources, contract management, and visitor information.

Ms. Hales was also a **VISTA (Volunteer in Service to America) volunteer**,

Education

BA, Economics
University of Vermont

MPA Graduate
Degree, Honors
Program, Public
Administration, Lewis
& Clark College

in Yakima, WA, where she initiated grass roots community organizing activities to improve the quality of impoverished neighborhoods.

CYNTHIA S. WORTH
WORTH LAW GROUP

Cynthia Worth received a Bachelor's degree from Gonzaga University in Business Administration and Finance in 1993, a Juris Doctorate from Gonzaga University School of Law in 1996, and an LL.M. in Taxation from the University of Washington in 1997. After earning her LL.M, Cynthia worked in Portland, Oregon for Arthur Andersen, LLP.

In 1998 Cynthia opened her own practice in Olympia, Washington. She now owns and operates the Worth Law Group, a tax boutique in Tumwater, Washington. Her practice emphasizes all areas of estate planning, the administration of trusts and estates, and taxation.

Cynthia served as President of the Olympia Chapter of Washington Women Lawyers from 2001-2004. She is also the immediate past President of the South Puget Sound Estate Planning Council. She currently serves on the Board of Directors for Providence-St. Peter's Hospital Foundation, is a member of the local Chamber of Commerce and the Thurston County Bar Association.

Steve Webster - FFF Vice-President

Steve is a small forest landowner in Lewis County and has been involved with forestry for the past 37 years. Prior to his recent retirement, Steve worked as a Forestry Extension Agent for WSU Cooperative Extension. The focus of his work had been to assist and inspire family forest landowners to learn about and practice sustainable forestry. Prior to this, Steve worked as a forestry research scientist, specializing in tree nutrition and soil management. Steve has a PhD in Forest Soils from North Carolina State University. He and his wife own and manage 120 acres of young Douglas-fir. Eighty of these acres have been in the family for four generations. Additionally, Steve is the managing general partner for the Webster Tree Farm, LP, which owns timber assets on 240 acres in Lewis County. He is an active and long-time member of the Washington Farm Forestry Association and the Society of American Foresters. Proud accomplishments include having been selected as Forester of the Year by the Washington State Society of American Foresters in 1993 and having been honored with recognition as a Fellow in the Society of American Foresters. Steve is also pleased with having been selected as the Centralia College 2005 Distinguished Alumnus.

DOUGLAS P. STINSON

PO Box 126
Toledo, WA 98591 USA
(360) 864 2681
treeman@toledotel.com

Professional Experience

Cowlitz Ridge Tree Farm
Manager
Washington State 1990-Present

Conifer Pacific, Inc.

Forester, Plywood Plant Manager
Washington State 1979-1990

Champion International

Forester, Sawmill and Veneer Plant Manager
Oregon/Washington 1964-1979

US Forest Service

Forester
Southeast Alaska 1959 -1964

Past Awards and Activities

1994 Western Region Tree Farmer of the Year
1993 Washington State Tree Farmer of the Year
1990-01 President Lewis County Farm Forestry Assoc.
1990 Ag-Forestry Class XI
1989 Member of Olympic National Forest Citizen Advisory Board
Forest Study Tours in Sweden, New Zealand, Tasmania,
Chile, Switzerland, Austria, Brazil, Hungary and Japan

Memberships

Society of American Foresters
Lewis County Farm Forestry Association
American Tree Farm System

Current Activities

Member – Washington State Forest Practices Board
Member – National Operating Committee – American Tree Farm System
Member – National Public Affairs Committee – American Forest Foundation

Sharon Rocket – Biography To Be Announced

Tom Bradley – Biography To Be Announced