

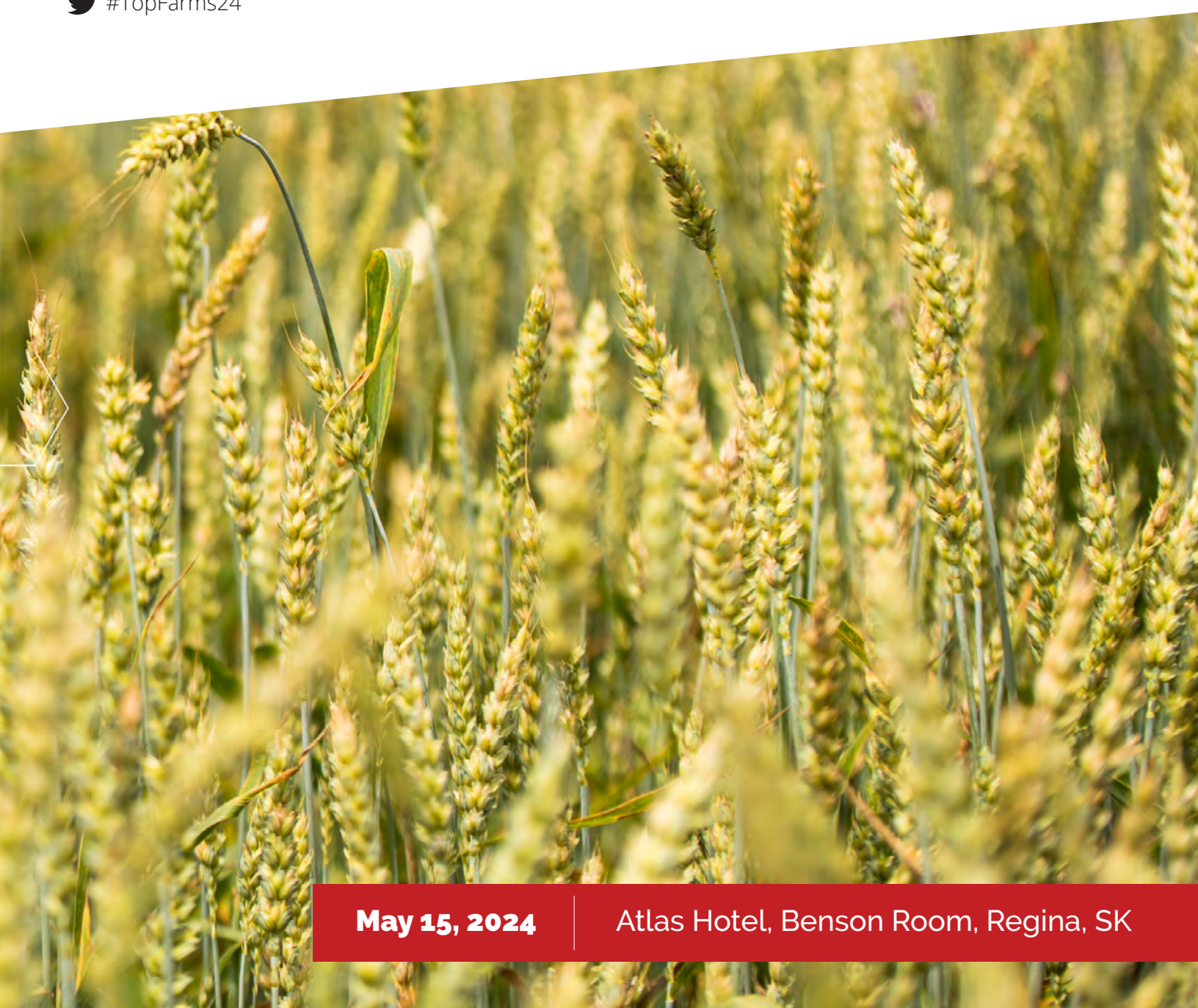
IMPROVING THE QUALITY OF FARM ADVICE



**2024**

# #TopFarms

 #TopFarms24



**May 15, 2024**

Atlas Hotel, Benson Room, Regina, SK

# Improving the quality of farm advice.

The Canadian Association of Farm Advisors (CAFA) Inc. is a national, not-for-profit organization dedicated to assisting farm families and businesses by increasing the skills and knowledge of farm advisors.

CAFA is an inclusive organization for all qualified farm advisors and consultants. CAFA members have professional credentials and on-going industry education. As members of Canada's only national association of Farm Advisors, they also attend local meetings and regional conferences to stay current with the farm sector and stay connected to a network of farm professionals for the benefit of their farm clients.



This CE activity has been approved by FP Canada as meeting the minimum requirements for 4 CE Approval as outlined within the FP Canada Continuing Education Guidelines. The views and opinions expressed in this presentation are those of the presenter / content author and do not necessarily reflect the views of FP Canada.

For Saskatchewan lawyers, accountants and Certified Management Consultants consider using this course as a CPD learning activity in your annual Continuing Professional Development Plan. CAFA's #TopFarms seminar qualifies for 4 FP Canada-Approved CE Credits.

## Agenda



### **Emcee: Brendon Fornwald, BBA, Backswath Management, Regina Chapter Chair**

Brendon Fornwald is a Farm Management Consultant at Backswath Management in Regina and joined the team in the spring of 2022. Brendon has over 7 years of experience providing detailed understanding and experience regarding financial management and services within the agriculture industry. Before Backswath, he was a Senior Relationship Manager with Farm Credit Canada within the Regina and Moose Jaw areas, focused on ag production lending opportunities and relationship management. Brendon's focus and values are about building strong relationships to provide timely and honest advice, strategizing off existing strengths, identifying opportunities, and mitigating risk while ultimately helping the client achieve success. Brendon lives in Regina with his wife Lenae and two children Munroe and Madden.

Brendon.Fornwald@backswath.com | (204) 275-0458 x 214



**8:00 - 8:50 am**

**Registration & Breakfast**

**8:50 - 9:00 am**

**Opening Remarks**



### **Shannon Lueke, PAg.**

Shannon is a Partner and Farm Management Consultant with MNP's Agriculture Services group in the North Saskatchewan Region. Working with producers, agri-business, government and other agricultural agencies, Shannon delivers advice and solutions tailored to each client's unique situation and goals.

Shannon draws on more than 15 years of experience to develop and implement solutions to the wide range of issues that today's farmers face. She assists with strategic planning, financial management, succession planning, production economics and human resources and connects clients with the firm's broad-based expertise when they are experiencing specific challenges.

**Contact:** Shannon.lueke@MNP.ca | 306-231-5212





9:00 - 9:25 am

### Agriculture economic outlook for Saskatchewan

- Inflation and interest rate trends
- Profitability projections for Saskatchewan agriculture
- Farmland value trends



#### Leigh Anderson, B.Sc., MBA Senior Agricultural Economist Farm Credit Canada

Leigh Anderson is a Senior Economist at FCC with experience in agricultural markets and risk. He specializes in monitoring and analyzing FCC's portfolio, industry health and providing industry risk analysis. In addition to his speaking engagements on agriculture and economics, Leigh is a regular contributor to the FCC Economics blog. Leigh came to FCC in 2015, joining the Economics team. Prior to FCC, he worked in the policy branch of the Saskatchewan Ministry of Agriculture. He holds a master's degree in agricultural economics from the University of Saskatchewan.

**Contact:** Leigh.Anderson@fcc.ca | 306-780-8100

9:25 - 9:30 am

### Q & A

9:30 - 9:55 am

### Wellbeing in Agriculture



- Gain awareness of the challenges faced by producers
- Gain an insight into how those challenges impact producer productivity
- Learn about the mental health service provided through SaskAgMatters Mental Health Network Inc.
- Learn about other resources available to agriculture producers and residents of Saskatchewan



#### Cynthia Beck, M.Sc. SaskAgMatters Network

Cynthia Beck, M.Sc., Registered Psychologist (provisional), works in rural mental health and is an agricultural mental health advocate. She proudly volunteers as a co-director for the SaskAgMatters Mental Health Network Inc. Her family operates a multi-generational mixed cattle and grain farm near Milestone, SK

**Contact:** SaskAgMatters@gmail.com | 306-371-7644

9:55 - 10:00 am

### Q & A

10:00 - 10:25 am

### Primer on Farming Joint Ventures

- Distinguishing Joint Ventures from Other Business Structures:
- Primer on Formation
- Income Tax and Accounting Considerations:
- Tips and Traps: navigating challenges and maximizing benefits of joint ventures



#### Jon M. Ponath, BComm (Dist), J.D., Associate, Felesky Flynn LLP

Jon practices in several areas of tax law, including tax planning for individuals, private corporations, and farm organizations. Jon earned his Juris Doctor of Law with Great Distinction at the University of Saskatchewan in 2016, adding to his Bachelor of Commerce (Finance), which he received with Great Distinction in 2013. Jon joined Felesky Flynn LLP in 2021, and regularly advises farmers on succession planning and taxation matters. Jon is currently the Chair for the Taxation Section of the Canadian Bar Association Saskatchewan Branch and is a member of the Canadian Tax Foundation. Prior to joining Felesky Flynn, Jon articulated as a Law Clerk at the Court of Appeal for Saskatchewan and Jon practiced three years at a full service law firm in Saskatoon where he gained experience working on a wide variety of corporate/commercial and tax matters.

**Contact:** JPonath@Felesky.com | (306) 986-2483

10:25 - 10:30 am

Q & A



**VIRTUS GROUP**  
Chartered Professional Accountants  
& Business Advisors LLP

10:30 - 11:00 am

Break

Sponsored by

11:00 - 11:25 am

### Farm Succession & Estate Planning: Reaping What You Sow

- The Basic Estate Plan from a Legal Perspective;
- Practical Considerations in Farm Succession Planning;
- Common Issues which Arise in Passing Down the Farm;
- Protecting Your Farm Succession Plan.



#### Aadon Fieger, J.D., Associate, McDougall Gauley

Aadon Fieger is an associate lawyer with McDougall Gauley LLP, having first obtained his juris doctor from the University of Calgary in 2013, and subsequently being admitted to the Saskatchewan bar in 2014. Aadon's estate planning practice focuses on working with his clients in developing a plan that fits their personal circumstances. This includes working with other professional advisors to ensure a client's estate plan fits within the context of their broader financial, insurance, tax, and disability planning. Aadon also works with personal representatives in administering all types of estates from simple to complex. This includes helping personal representatives navigate the legal aspects of a deceased person's estate efficiently at each stage of the administration process, from date of death to final distribution to the beneficiaries.

**Contact:** AFieger@McDougallGauley.com | (306) 565-5159

11:25 - 11:30 am

Q & A

11:30 - 11:55 am

### Introduction to Edward Jones & Estate Planning

- The History of Edward Jones
- Succession and Estate Planning
- Different Styles of Investments for Business Owners
- Intergenerational Preservation of Wealth

Edward Jones



#### Kiran Vishwasrao, DFSA, Edward Jones

Kiran Vishwasrao is a licensed Designated Financial Service Advisor with Edward Jones with over 3 years of financial experience. Kiran works with clients in agriculture, land developers, executives, and professionals such as lawyers, accountants, physicians, and engineers. Aligned with our firm philosophy, he has adopted a conservative investment approach with a strong focus on capital preservation, income generation, and steady long-term results to ensure peace of mind. Clients can be rest assured that we offer transparent fee structures, strong governance, and credibility.

**Contact:** Kiran.Vishwasrao@Edwardjones.com | (306) 992-7304



#### Evan Grunberger, TEP, BMO Insurance



Evan Grunberger is a seasoned Insurance expert, with over 10 years' experience in the financial services industry. In his role, Evan focuses on delivering customized solutions, timely insights, superior customer service, and value-add to Advisors – and their clients – across Western Canada. He represents BMO's suite of insurance products, acting as a resource for product information and sales aids, and specializing in Guaranteed Investment Funds (GIF), and Annuities (SPIA).

**Contact:** Evan.Grunberger@BMO.com | (604) 817-6246

11:55 - 12:00 pm

Q & A

12:00 - 12:30 pm

Fireside

Facilitated by Patti Durand, with Aadon Fieger, Kiran Vishwasrao and Evan Grunberger on farm transition.



**Patti Durand, PAg, FEA, CAFA**

Patti has guided hundreds of Canadian farm business families to confidently navigate the paths of transition decision making. As a speaker and workshop leader, Patti aims to provide relatable, actionable ideas to help business families move ahead, together and with certainty. Her positivity, practical experience and strategic brain means Patti can help “move a lot of dirt” quickly toward better solutions.

**Contact:** [BrightrackConsulting@gmail.com](mailto:BrightrackConsulting@gmail.com) | (306) 231-8650

12:30 - 1:30 pm

Lunch

1:30 - 1:55 pm

**Key employment considerations for farm operators**

- Common employment standards and human rights liabilities
- Examples of agricultural OH&S liabilities
- Employment contract improvements
- Health and safety improvements



**Calen Nixon, Partner, McDougall Gauley**

Calen is a partner at McDougall Gauley LLP, based in Regina, Saskatchewan. A significant part of Calen's legal practice involves advising Saskatchewan businesses and other organizations in relation to employment issues and managing liabilities. He also has significant agricultural litigation experience, including resolving shareholder, crop insurance and seed technology enforcement disputes. Prior to joining McDougall Gauley in 2021, Calen practiced at a regional law firm for five years. He strives to develop practical and value-focused management strategies that are shaped by his previous work and leadership experience in various industries across Western Canada.

**Contact:** [CNixon@McDougallGauley.com](mailto:CNixon@McDougallGauley.com) | (306) 565-5101

1:55 - 2:00 pm

Q & A

### Supporting Sponsors



**Grant Thornton**

Audit | Tax | Advisory

2:00 - 2:25 pm

## Recruitment and retention of workers in the agricultural industry in the 2024 labour market

In an industry with such a critical labour shortage, understanding how to recruit, hire and retain employees effectively is more important than ever. This presentation will provide you with an overview of the current labor market in the industry and practical tools and best practices on how to find and retain the right employees.

- Current labour market stats and trends
- Cost of employees' turnover
- Recruitment strategies
- Retention best practices



### **Viktoria Schuler, Project Manager HR Services, Canadian Agricultural Human Resource Council**

Viktoria Schuler is a driven HR Professional offering 15+ years of experience in recruitment, global mobility, and immigration. She brings strong expertise in full-cycle recruitment, project management, and HR management. Before joining the CHARC team, she supported agricultural producers in Western Canada with the foreign and local recruitment process by assisting with strategic workforce planning, developing job descriptions, personal worker profiles and job profiles, determining immigration pathways, facilitating interviews, advising on settlement support, retention strategies, and providing on-going assistance throughout the entire process. Due to her experience and connections with the producers, Viktoria has a strong understanding of labor market trends in the agricultural industry, its challenges, and opportunities.

**Contact:** VSchuler@CAHRC-CCRHA.ca | (306) 321-7505

2:55 - 2:30 pm

Q & A

2:30 - 2:45 pm

Break

2:45 - 3:10 pm

## Precision AI

Precision AI is on a mission to accelerate artificial intelligence-based farming practices to create healthier, happier, and more profitable farms. By leveraging custom-built AI technology in drones, Precision AI takes crop production decisions from a whole field to an individual plant level. Transforming the industry's dependence on bulkier technology for decades, the outcome of these solutions helps craft the machines of tomorrow that will feed the world.

With headquarters in North America, Precision AI is scaling rapidly with an elite team dedicated to solving the agricultural challenges of farms around the world.



### **Jessica Day, Senior Marketing Manager, Precision AI**



Jessica Day is the Senior Marketing Manager at Precision AI. A results-driven professional, Jessica has delivered exceptional outcomes in the past 13 years of her career, spanning various industries such as agriculture advocacy, technology, brewing, printing, tourism, and non-profit community programming. Her expertise has earned her a reputation for strategic thinking, creative flair, and driving business growth. During her initial two years at Precision AI, Jessica has spearheaded 13 global award wins, secured 50+ news articles, and achieved a 120% year-over-year increase in web traffic. She spent a decade living and working on a mixed-operation farm, which sparked her commitment to sustainable agricultural practices and advocating for a bright farming future.

**Contact:** Jessica@Precision.AI | (306) 530-5661

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**3:10 - 3:15 pm**

**Q & A**

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**3:15 - 4:00 pm**

**What I wish someone told me about the Carbon**

- Principles to qualifying for a carbon credit.
- What is the market doing?
- How can ag take advantage of carbon?
- What's in store for the future.



**Marty Seymour, B.A.Sc., CEO CarbonRX**

Marty Seymour was raised on a mixed farm in southeast Saskatchewan. Graduating, in 1998 from the University of Saskatchewan with a degree in Animal Science, he has had an eclectic career in business development and marketing in many disciplines associated with Canadian agriculture.

One of the most interesting assignments in Marty's career was his time as CEO of Canadian Western Agribition. Under his leadership, he helped position Saskatchewan as an agriculture centre of excellence through various trade missions to southeast Asia, Australia, and the US. His most notable legacy was the financial turnaround of Agribition culminating in the construction of the \$35M International Trade Centre building in Regina.

Marty is currently the Chief Executive Officer for Carbon RX, an organization dedicated to the reduction and capturing of greenhouse gases with a focus on agriculture, forestry, and energy. The core business is dedicated to developing partnerships with indigenous groups to facilitate the participation in the carbon economy through climate action initiatives.

**Contact:** Marty.Seymour@CarbonRX.com | (306) 352-6132



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**4:00 - 4:15 pm**

**Q & A**

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**4:15 pm**

**Closing remarks & adjourn**

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**Move to bar downstairs to network**

