

Chapter 9.

Resources





Planning Professionals

Central Wyoming Estate Planning Council

Serena Cobb, Wells Fargo Bank

Box 2799

Casper, WY 82602

Phone: 307-235-7750

E-mail: serena.a.cobb@wellsfargo.com

Certified Financial Planner, Board of Standards

1425 K Street, NW, Suite 500

Washington, DC 20005

Toll free: (800) 487-1497

Phone: (202) 397-2200

Fax: (202) 379-2299

Website: www.cfp.net

Northeast Wyoming Estate Planning Council

Matt Sleep

P.O. Box 3004

Gillette, WY 82717

Phone: (307) 687-4474

Southeast Wyoming Estate Planning Council

Dixie Roberts

3000 Central Ave.

Cheyenne, WY 82001

Phone: (307) 778-8321

Fax: (307) 778-3128

Website: www.sewepc.org

Wyoming Insurance Department

106 East 6th Ave.

Cheyenne, WY 82002

Phone: (307) 777-7401

Toll free number inside Wyoming (800) 438-5768

Fax: (307) 777-2446

E-mail: wyinsdep@state.wy.us

Website: <http://insurance.state.wy.us>

Search for insurance providers in your area and find out if a company is licensed in Wyoming.

Wyoming Society of Certified Public Accountants

504 W. 17th St., Suite 200

Cheyenne, WY 82001

Phone: (307) 634-7039

Fax: (307) 634-5110

Website: www.wyocpa.org



Planning Professionals (cont.)

Wyoming State Bar Association

4124 Laramie St.
P. O. Box 109
Cheyenne, WY 82003
Phone: (307) 632-9061
Fax: (307) 632-3737
Website: www.wyomingbar.org

Real Estate Appraisers

Wyoming Real Estate Commission
2020 Carey Avenue, Suite 702
Cheyenne, WY 82002-0180
Phone: (307) 777-7141
Fax: (307) 777-3796
Website: <http://realestate.state.wy.us/>
Search for real estate agents and appraisers in your area.

Mediation & Facilitation

Wyoming Agriculture & Natural Resource Mediation Program
2219 Carey Avenue
Cheyenne, WY 82002
Phone: (307) 777-8788
Toll free: 1-888-996-9278
Fax: (307) 777-8788
Website: <http://wyagric.state.wy.us/divisions/nrp/mediation-program>



State & Federal Resources

State

Wyoming Department of Health: <http://www.health.wyo.gov/healthcarefin/medicaideligibility/index.html>

Wyoming Institute for Disabilities: <http://www.uwyo.edu/wind/news.asp>

Wyoming State Bar Association: www.wyomingbar.org

Federal

Administration on Developmental Disabilities (ADD): <http://www.acf.hhs.gov/programs/add/addabout.html>

American Institute of Certified Public Accounts/Personal Financial Planning Division: www.Aicpa.org

The American Bar Association (ABA) <http://www.abanet.org/referral/home/html>

Centers for Medicare and Medicaid Services: <http://www.cms.gov/home/medicaid.asp>

Complete Long Term Care: <http://www.completelongtermcare.com>

Department of Health and Human Services: www.hhs.gov

Federal requirements reports available for certified facilities: www.medicare.gov

FINRA Broker Check <http://www.finra.org/Investors/ToolsCalculators/BrokerCheck>

Long term care health programs of the federal Housing and Urban Development: www.hud.gov/healthcare

Major information on health rules, etc. associated with long term care facilities: www.cdc.gov

Medicare.gov: <http://www.medicare.gov/longtermcare/static/home.asp>

National Association of Estate Planners and Councils: http://www.naepc.org/search_councils.web

National Association of Insurance Commissioners (NAIC) at www.naic.org

National Association of Personal Financial Advisors: www.napfa.org

North American Securities Administrators Association at www.nasaa.org or

National Association of Securities Dealers Regulation www.nasdr.com

Securities and Exchange Commission www.sec.gov

The Federal Government's Administration on Aging: www.aoa.gov

The Occupational Safety and Health Administration: www.osha.gov



Additional Resources

Best Intentions, Ensuring Your Estate Plan Delivers Both Wealth and Wisdom (2002) Colleen Barney and Victoria Collins. Dearborn Publishing.

Difficult Conversations: How to Discuss what Matters Most (2000) Douglas Stone, Bruce Patton, Sheila Heen, and Roger Fisher. Penguin.

Difficult Conversations (March 2005) Trime Persinger. Available at www.mediate.com/articles/persingerT7.cfm.

Estate Planning and Family Business Mediation Laura Bachle. Available at Mediate.com.

Estate Planning and Taxation Articles: <http://www.nationalaglawcenter.org/readingrooms/estateplanning/>

Estate Planning Links: Estate Planning Resources for Consumers and Professionals: <http://www.estateplanninglinks.com/business.html>

Estate Planning for Baby Boomers and Retirees: A Comprehensive Guide to Estate Planning. (1998) Stewart H. Welch, III. Wiley.

Estate Planning Publications: various topics. Marsha Goetting. Montana State University. <http://www.montana.edu/estateplanning/>

Farm Journal Estate and Succession Planning Legacy Project: <http://www.agweb.com/legacyproject>

Financial Security in Later Life (various resources collected by CSREES) www.csrees.usda.gov/nea/economics/fsll/fsll.html

Getting Ready for Estate Planning (2004) Purdue University. www.ces.purdue.edu/estateplanning/

Getting to Yes (1981) Roger Fisher & William Ury. Penguin.

Mediating a Key Estate Settlement Issue—Dividing Personal Property (March 2003) Rikk Larsen. Available at Mediate.com.

One-Text Mediation Process: Clinton's 2000 Christmas Proposal to the Israeli's and Palestinians (2001) Paula Young. Available at [Mediate.com](http://www.Mediate.com).

Planning the Late-career, Retirement-mode Years (2003) Kenneth Thomas. Business Management for Farmers series. NCR610F. Midwest Plan Service. Iowa State University. 800-562-3618, www.extension.iastate.edu/store/.

Some Do's and Don'ts for Successful Farm and Ranch Family Estate Transfers" Robert J. Fetsch (June 1999) Journal of Extension Volume 37, Number 3. www.joe.org/joe/1999june/iw2.html

The Seven Habits of Highly Effective People (2004) Stephen R. Covey. Free Press.



Transferring Your Farm or Ranch to the Next Generation (2000) Marsha Goetting, Sharon Danes, Virginia Kneer, Chuck Leifeld, and Garry Bradshaw. Montana State Extension Service EB 149.

“What Good Is It if We Don’t Get Along?—Or Planning for Family Harmony” (2000) Verlyn De Wit. Western Dairy Business. Reprinted in Agricultural Labor Management, available at [www.cnr.berkeley.edu/ucce50/ag-labor/7article/article24.](http://www.cnr.berkeley.edu/ucce50/ag-labor/7article/article24.htm)

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Who Will Get Grandpa’s Farm: Communicating about Farm Transfer (2003) www.ces.purdue.edu/farmtransfer/