

NOVEMBER 2021

# Client Advisory Newsletter

SPECIAL EDITION



**Happy Harvest and  
Happy Holidays to  
all of our clients  
and friends!**

**We hope this  
newsletter finds  
you with full bins  
and full tables  
with Thanksgiving  
around the corner.**

For years our advisory newsletters have conveyed important updates to the law and provided counsel for your farms and families. Keeping you in the loop regarding topics is our duty as legal professionals and doing so helps fulfill our goal of helping your farm business thrive.

We were hoping to report on new tax law but since nothing is settled we are reporting on happenings at our firm instead. Each member of the team will share a personal article with you, and those pieces will relay family news, achievement of professional goals, and messages of optimism and support. The articles are about our ability as a firm and as a family to strive and thrive. There is an especially important article regarding our own succession planning. The future of Wright and Moore, and the future of each of our families sure looks bright!

As always, we are here to answer your questions and address your concerns. If you're looking for guidance with these updates, pick up the phone and give us a call. We will be glad to chat with you. Be safe and healthy this holiday season, and we look forward to seeing all of you in the office, in the field, and at upcoming agricultural events!

# Robert & Kelly



## Clients, Colleagues and Family,

After years of helping you formulate your succession plan, the time has come for us to implement our own. We are hopeful that ours will be a smooth and enjoyable transition. We want to ensure that these changes will have minimal impact on our day to day operations as you experience them, and our ability to provide quality legal services to you and the farm community is not affected in any way.

Some changes have occurred in our lives that have caused us to decide to reduce our time commitment at the law firm. Kelly's parents live in South Carolina and as they experience their golden years she would like to spend more time there.

Our daughter Maddie is a sophomore in high school and involved in numerous activities. We both look forward to being more present for her.

Robert has been invited to work with the Agricultural and Natural Resource Law Program at The Ohio State University. He is excited to get back into education where he began his career. He will be focusing on providing farm succession information to Ohio farmers as well as helping with teaching an agricultural law class.

Even as we cut back, we will continue to work with our existing clients on estate planning, business planning and succession planning. New clients and other matters will be mostly handled by Ryan Conklin and Evin Bachelor in our office. We will be available to Ryan and Evin for assistance when needed. So, our intent is for you not to notice our transition too much. The biggest change may be the need for flexibility in scheduling appointments with us.

Additionally and most importantly, as part of our succession plan we will be selling the firm to Ryan. We are confident that Ryan shares our commitment to providing legal services to our clients and serving the agricultural community. Ryan has been an important part of our team and we are fortunate to have someone who shares our values and commitment and can take the firm into the future. With our reduced time at the firm, we felt this was a good time to transition the ownership of the firm.

As with all succession plans, how you handle the transition is important. Having the right people in place to “step into your shoes” is tantamount to success. Ryan has worked alongside us, learning, growing, and moving towards this point. He has shown confidence, integrity and enthusiasm not only for running the firm and maintaining the culture of the firm, but most importantly, for carrying out the mission and vision we have worked so hard to uphold. It was important for us to carry on Paul Wright’s vision and service to the ag community when we took over the firm so many years ago. It is important to us now that Ryan continue this legacy. We have the upmost confidence in him.

Our whole team here at Wright and Moore has been essential in the planning and implementation of this transition. We are so fortunate with not only Ryan, but Evin and Ashley as well. We are very lucky to have such a youthful, intelligent, and ambitious team. It reassures us to know we have such a good work family to entrust something so important.

Most importantly, we both truly enjoy working with our clients. It is such an honor to sit with each of you and help develop, navigate, and solve your issues. We are very lucky that you trust us to be part of your team and we want to continue that relationship.

Again, our goal is for you not to notice our transition. We will still be available for emails, phone calls and appointments. We value our relationship with all of our clients and are dedicated to continuing to provide services as we have in the past. We appreciate your understanding as we transition to the next part of our careers and lives. Ryan, our work family, and you will help put the SUCCESS in our succession.

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**Please contact either of us  
if you have any questions or  
concerns.**

**We look forward to working  
with you for a long time into the  
future.**

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## **Special Tax Alert**

Like many of you, Wright & Moore has been closely following the potential tax law changes coming out of Washington, D.C. At the time we published these articles, the discussions were pending and changes had not been finalized.

We hoped that this newsletter could cover the important family updates and provide tax action items to our clients. If the tax code is revised in the coming months, you can expect to see another newsletter summarizing the new rules in early 2022.

For now, if Congress and the President pass tax changes before year-end, please call our office to talk about potential impacts to your plan. Like we have practiced for years, potential tax impacts will be analyzed on a client-by-client basis to ensure the proper steps are taken to protect your farms and families.

Any changes will likely take effect on January 1, 2022, so the window between the announced changes and effective date may be very short. If you would like to discuss tax law changes by year’s end, please call us at your earliest convenience to schedule.

**Stay tuned for more information!**



# Ryan

## Clients and Friends of Wright & Moore,

What a time to be a succession planning attorney. After countless meetings, emails, and phone calls about transitioning a farm or business to the next generation, now it's our turn to get the job done for the firm. Better make sure we follow our own advice to complete this succession plan, right?!

So, time to meet the new boss, same as the old boss. Don't believe me? How is this for similarities between Robert and Kelly and Anna and me?

- Robert and I both came from dairy farm upbringings and have degrees from the Animal Sciences and Agricultural, Environmental, and Development Economics Departments at Ohio State
- Kelly and Anna both come from the southeastern states (Kelly from North Carolina and Anna from Georgia)
- Robert, Kelly, and I share backgrounds in education and extension
- Both families feature "children" weighing about 10lbs (Miss Cotton the dog for the Moores and Anna's cat Dora)
- Now I am proud to share another commonality with Robert and Kelly: principal of Wright & Moore.

A couple years ago I think Robert and Kelly unofficially tabbed me as their successor at Wright & Moore. Both of them began to mentor me in various ways, whether it was law firm management, the practice of law, legal ethics, and business finances. I took the part of trainee, asking questions, absorbing their knowledge, and taking opportunities to represent the office at every turn. Robert and Kelly's stewardship has brought us to this point, where they

have the comfort and confidence to pass off a firm they made better for the last decade.

Due to their leadership, and the leadership of Paul before them, I can answer an important question: is the name of the law firm going to change? The answer is no.

Wright & Moore will remain as such for a long time in recognition of the investment by my predecessors to build the office. Robert, Kelly, and Paul built a firm that is respected statewide, and I have some work to do before reaching their level.

Speaking of that work, another easy decision came in the form of our practice areas and our clientele. We are proud to serve the legal needs of the family farmer across all corners of the state, and that service will not deviate under my tenure. Our history in Ohio agriculture is established, and our future in that industry will be expanded. In the coming years I will explore the addition of new practice areas to benefit our clients and will seek to hire new associates who expand the geographic reach of the firm. Adaptability





is essential to our field, and plans are already in motion to continue that effort.

Later in this newsletter you'll hear from Evin and Ashley and learn about their own life changes. Both of them bring valuable elements to the firm, and I am so grateful they have chosen to make Wright & Moore part of their long-term career plans. Evin, Ashley, and I will continue the team-focused culture of our firm, and we will all benefit from Robert and Kelly staying onboard to guide us. This combination of continuity and collaboration will help the office prepare the next group of Ohio farm attorneys.

Wright & Moore strives to be the premier farm succession planning law firm in Ohio. That reputation stems from 30+ years of working with families and helping them achieve successful transitions from one generation to the next. Drawing on years of practice in this field, Robert, Kelly, and I have spent hours planning for our own moment to transition the business. With the help of Anna, the Moores, Evin,

Ashley, our friends and family, and a superb group of advisors, I am ready to write this new chapter in the story of Wright & Moore.

To all our clients and partners, I am humbled by your willingness to be represented by Wright & Moore, and by the referrals you send to us on a regular basis. My goal is to grow present and future relationships, maintain the confidence in our services, and continue to provide legal counsel that exceeds your expectations.

Great days are ahead for our firm, and I look forward to sharing those successes with all of you.

**At your service -**

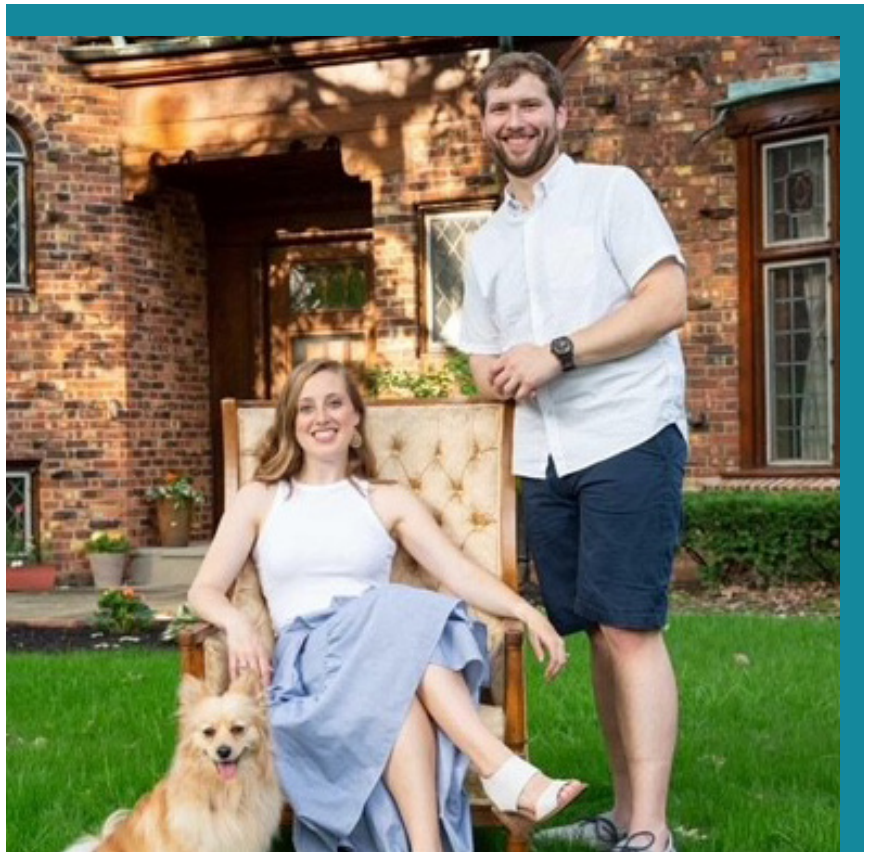
**Ryan C. Conklin**  
**Attorney**  
**Wright & Moore Law. Co., LPA**



# Evin

I am excited and honored to announce the opening of Wright & Moore “West”. Our team has partnered with a Celina based law firm so that Wright & Moore will have an office conveniently located for our clients in western Ohio and eastern Indiana.

This announcement is years in the making, both for Wright & Moore and me.



Wright & Moore has served farmers and landowners from all over Ohio for decades, and we have a number of existing clients in western Ohio. We see great value in being closer to these existing clients, as well as a wonderful opportunity to reach new clients. Since I am also licensed to practice law in Indiana, being closer to Indiana will make it easier for potential clients to access our services. We do not want distance to be a reason not to work with us.

As for me, I was born and raised in Celina, and it is my home. My fiancé, family, and many of my closest friends are in western Ohio. My fiancé, Katie, and I will be married next June, and I am so excited to start our life together in Mercer County. It is time for me to be closer to home.

From a professional standpoint, our rural communities in western Ohio are turning into legal “deserts.” While our urban centers have plenty of lawyers, small towns are currently retiring attorneys at a much faster rate than they can bring them in. I have long felt a sense of duty to serve my community, and working from Celina will allow us to be part of the solution.

Given these reasons for a western Ohio office, when the opportunity arose to open a Celina office, we took action.

Attorneys Tom Lammers and Lou Schiavone from Purdy, Lammers, and Schiavone in Celina have served the Mercer and Auglaize County communities for four decades. I have known these men for years, and they have helped my friends and family with a variety of legal needs. They reached out to me as part of their succession planning process (it’s not just farms that need succession planning!), and a plan came into being.

As Ryan transitions into ownership of Wright & Moore, I will transition into ownership of Purdy, Lammers, and Schiavone.

I will continue to serve Wright & Moore clients, farmers, and landowners needing advanced farm succession planning through Wright & Moore, while my Purdy, Lammers, & Schiavone practice will cater to general clients in the local area.

My practice with both teams will continue to focus on

estate planning (trusts and wills), estate and probate administration, business planning, real estate, and contracts. A major difference between the two firms is that Purdy, Lammers, and Schiavone also serves clients in the criminal and domestic relations realms, which are areas of law that our Wright & Moore team does not practice.

I cannot thank Robert, Kelly, and Ryan enough for their trust and belief in me as I dive into this opportunity for Wright & Moore and my community. It's not very often that an employee of one and a half years comes in asking the bosses to be okay with you taking on a second job, and even more rare that the bosses jump on board. It is a true testament to our faith in each other as a team, and to our belief that this will be beneficial to our clients.

# Ashley

Whew, time sure flies when you are having fun! I cannot believe I joined the Wright & Moore family over 3 years ago. I remember being so nervous to make this career change since my previous work experience included being a certified medical assistant at a pediatric office and an educational assistant for 7th – 12th graders. Honestly, I can now say that I cannot imagine being anywhere else besides Wright & Moore.

With that said, I too am going through a period of transformation personally and professionally. For the past three years I have been the one to schedule your appointments, answer the phone, and greet each of you when visiting our office. I will be switching roles in the office as I transition from Office Coordinator to a legal assistant position in preparation of becoming an attorney (hopefully!) within the next three years. After I leave work in the evenings, I head down to Capital University Law School where I attend the evening program. I am on track to graduate in May of 2024 and take the bar exam a couple of months later in July. I am excited and looking forward to working with each of our clients in this new role!

Wright & Moore's commitment to our clients has always been, and will continue to be, providing quality, timely, and convenient legal services for Ohio farmers and landowners. Whether we meet in Delaware, Celina, via Zoom, or on your farm, all of our clients will receive the same level of care and expertise from our Wright & Moore team.

I am licensed to practice law in both Ohio and Indiana, so if you are in western Ohio or eastern Indiana and would like to meet with us in Celina, give us a call at (740) 990-0750.



As if starting law school during a global pandemic wasn't crazy enough, my fiancé (well that's weird to say—we just got engaged October 23rd), his son, and I bought our first home in Marysville this spring! Andy is a high school math and STEM teacher working on his Master's Degree through the University of Cincinnati, and Hudson is in the 4th grade this year! I am so thankful for their love and support because we would not be able to handle all of these exciting changes if we were not such a great team!

The future is bright and I am excited to see where all of these new adventures take us!

**“Real change, enduring change happens one step at a time.”**

**– Ruth Bader Ginsburg**

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