wittmanconsulting
Empowering Proficiency in Agricultural Farm Management

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Consulting Contacts *Updated July 31, 2023*

The following provide consulting services in family farm business management, peer networks, managerial accounting, conflict management and/or succession planning. These resources include people with whom this firm has collaborated, and/or shares a similar philosophy and approach to assisting clients with problem identification and solutions building. A majority of those listed have attended Wittman train-the-trainer programs.

Adams Brown LLC: A regional CPA and business consulting firm specializing in the Ag Industry with locations throughout the midwest. We focus on helping Ag clients to maximize their financial and family business governance success. The firm also offers intergrated farm management solutions (Agribuilder) that bring together accounting, financial and consulting services. Ag industry team leaders are Bill Glazner, 620-241-2090; Jennifer Berning 620-663-5659; Brian DeWitt 785-628-3046; Trisha Bengston 620-241-2090; Ryan Scheck www.adamsbrowncpa.com.

AgChoice Farm Credit - Business Consulting – approximately 25 consulting staff in Pennsylvania and Maryland. Consulting Group works in tax, finance, estate planning and family business governance. Contact Gary Heckman at gheckman@agchoice.com or Raechel Sattazahn at rsattazahn@agchoice.com

Ag View Solutions: Working with Farmers/Ag Businesses in U.S. and Canada on cost of production, farm profit management, farmer collaborations and business opportunities, business structuring, transition planning, peer group facilitation, safety training, multi-generational business model. Iowa Headquarters. Podcast: Ag View Pitch, Chris Barron: cbarron@agviewsolutions.com, (319) 533-5703 agviewsolutions.com

Terry Betker, CEO, Backswath Management Inc, terry.betker@bakcswath.com, www.backswath.com,
O-204-275-0458; C-204-782-8200; Winnipeg, MB, Canada. Formerly with MyersNorrisPenney, Betker works with a network of consultants working on business continuity/succession planning, benchmarking, growth and risk management, and external management resources/advisory boards.

Centrec Consulting (Champaign, IL) Steve Hofing, Managing Partner, 217-352-1190,www.centrec.com. Wittman Consulting has associated with this firm since the early 1980's on topics including lender training, family business, strategic planning, public policy, CFO support functions, and financial feasibility.

CliftonLarsonAllen has offices in several mid-west and eastern states and the PNW. Paul Neiffer paul.neiffer@cliftonlarsonallen.com tax expert, columnist and FarmCPA blog on www.agweb.com, 509-823-2920 (direct), 509-961-9739 (cell). Yakima, WA . Other resources: Darel Thompson (Tri-Cities, WA) darel.thomsen@cliftonlarsonallen.com; David Thomsen (Quincy, WA), david.thomsen@cliftonlarsonallen.com, 509-787-4513; and Rod Mauszycki rod.mauszycki@cliftonlarsonallen.com 612-376-4500 Minneapolis, MN.

Len Davies serves clients throughout Eastern Canada facilitating a holistic succession planning process that uses out of the box thinking to create options for farm families to consider. Len works with clients and their advisors to implement a plan to suit his clients' farm business. Len also works with clients to develop risk management strategies as well as completing Farm Financial Assessments that identify key farm ratios for his clients to measure and manage their business. Davies Legacy Planning Group Inc; len@davieslegacy.ca 519 437 9059 (C) 519 678 3862 (O) www.davieslegacy.ca

Brenda Duckworth – formerly with Texas Ag Extension; now working with individual clients on Management Accounting and family business management issues, P O Box 161, Happy, TX 79042; C-940-357-9777, brenda.duckworthcpa@gmail.com

Eide Bailly LLP, Steve Eckroth (ND) 701-255-8446, tax and consulting; Steve Troyer (Fargo, ND), stroyer@eidebailly.com, 701-476-8307; Jim Hauge, Bismarck ND, jhauge@eidebailly.com 701-255-8484; Duane Thompson (Mankato, MN), dthompson@eidebailly.com, 507-386-6290.

Wayne Fahsholtz's AgWin Group, LLC offers management-consulting services for farms, ranches and other small businesses.   Wayne was formerly CEO of Padlock Ranch Company until July 2014; he has experience in strategic planning, managerial accounting, family conflict resolution, leadership succession and peer group facilitation. Wayne has collaborated with King Ranch Institute classes, Montana State University Executive MBA and John Ward at the Kellogg School of Management's family business program. Contact at: 307-751-4507; wayne@agwingroup.com, http://www.agwingroup.com; Box 432, Dayton, WY 82836

Farm Credit East Business Consulting – approx. 20 consulting staff throughout New England, New York, and New Jersey. Consulting Group goal is to match local folks up with local consultants with expertise specific to client's needs or project. Contact: Erin S. Pirro, Business Consultant, Enfield, CT, 860-741-4451, erin.pirro@FarmCreditEast.com, www.farmcrediteast.com/en/Services/Business-Consulting.aspx

Farmgate Consulting, Joel Mathiowetz farmgateconsulting@gmail.com**, M-**507-430-8336 Joel mentored under Joe Kluender and serves clients in northern Minnesota and North Dakota area**.**

Ed Frey, Credit Review Group, LLC – Ed spent 30 years with Farm Credit System working up from a loan officer to senior management. He now focuses on consulting with Ag lenders on business practices, credit training, and loan portfolio reviews. He also works with farm and ranch families to assist in their decision-making processes. Raised on a Nebraska farm, he graduated from Kansas State University, then obtained hip Studies Degree (MS) through Southwestern College in Winfield, Kansas. **Contact Ed at: Wichita, KS, (316)-285-5453,** ed@creditreviewgroup.com

Elaine Froese - CSP, CAFA, Farm Family Transition Specialist, consults in Canada, US and Australia in conflict resolution and succession planning and her family farms in Manitoba, CA. She writes columns, has authored 5 books. She helps farm families find harmony through understanding. As a professional speaker and certified coach she works virtually via zoom . Contact: 204-534-7466 www.elainefroese.com

Family Farms, LLC is a farmer-owned and led community of farms across the US and Canada providing access to like-minded farm owners and expert consultants in financials, management, business development, Human Resources, compliance, entity structure, and succession planning. A Coach is assigned to each farm member to guide, encourage, promote implementation, and ensure accountability. With a staff of more than 70, our goal is to apply our expertise in helping farm families define and achieve their goals. Contact us at: dbuck@familyfarmsgroup.com or 618-372-7427.

Gilk Legacy Law PLLC: Jennifer Gilk grew up on a dairy farm in southwest Minnesota, and since 1993 has assisted farmers and family businesses with all things related to farm succession. Jennifer concentrates her law practice in estates and trusts, business entities (corporations/LLCs/partnerships), and real estate. She prefers a team approach to succession planning and works closely with the client's tax and other advisors to develop a successful and workable plan. Contact Jennifer Gilk at jgilk@gilklegacylaw.com. Phone: (507)-627-4525

GROW: The Family Business Advisors/Family Business Consulting Group. Consultants Barb Dartt, Stephanie Edsall, Mike Fassler and John Williams launched new firm January 2013 and later joined with FBCG; they support family businesses and farm operations in succession planning, financial management, strategic planning, and helping clients build teams processes; located at 5708 Venture Court, Suite A, Kalamazoo, MI; www.growthefamily.biz;800-663-5604.

Donald Jonovic, PhD, Family Business Management Services Inc, has been an advisor to family business owners since 1973, focusing on management development, growth and ownership transition. Clients include industrial and agricultural firms, often with a significant proportion of non-family key managers. He's authored several books on family business. Jonovic and Wittman's have collaborated at workshops and as instructors at the TEPAP Ag Executive Program for a number of years. Contact at: Cleveland, Ohio , W-216/752-7970; djonovic@familybusinessmgt.com

KEB AgGroup includes CPA's and consultants within the firm of Kerber, Eck & Braeckel, a larger firm of 250 staff in six offices throughout the Midwest. The AgGroup, centered in the Litchfield, Illinois office is led by David Pritchard, Senior Managing Partner, and includes staff with strong agricultural tax and finance backgrounds. The firm provides organizational planning, tax structuring, farm operation business management and family succession planning. Contact at (217) 324-6611, dpritchard@kebcpa.com, Jerome Zook, jzook@kebcpa.com, Blake Pollard bpollard@kebcpa.com, www.kebcpa.com/ag

KCoe Isom, LLP – In addition to accounting, tax, estate planning, and various consulting services, several people at Kcoe provide facilitation, mediation, management succession planning, governance and general family business advisory services specialized for agriculture ventures. They also lead an executive seminar called The Progress Coach for next-generation family business members and facilitate numerous peer groups. Contacts include Lance Woodbury (Kansas City)
lance.woodbury@kcoe.com; Davon Cook (Denver) davon.cook@kcoe.com; Ethan Smith (Ft. Worth) ethan.smith@kcoe.com; Jeanne Bernick (Iowa), jeanne.bernick@kcoe.com; Brad Palen (Salina, KS), palen@kcoe.com; Bart Nichols (Kansas City), Bart.Nichols@kcoe.com.

Kuenzi & Company CPA's & Business Consultants, Kyle Walter (Salem, OR) PH: 503-428-3098. Email: kwalter@kuenzicpas.com website: www.kuenzicpas.com. Kuenzi owners all come from farming backgrounds and have committed their firm's resources to work extensively with family businesses in areas of corporate governance, family dynamics, business and succession planning, and tax and financial analysis.

Henry Landes, Delaware Valley Family Business Center, has served over 600 family firms since 1988; is popular speaker and contributing editor of Family Business Magazine. He focuses on building effective family councils, shareholder groups and executive teams, policy development and transitioning to the next generation. Contact at: 340 North Main Street, Telford, PA 18969; Voice (215)723-8413; Fax (215)723-8351.

Latta, Harris, Hanon & Penningroth (Tipton, IA). Mark Penningroth CPA, markpenningroth@lattharis.com and John McNutt, MBA jmcnutt@lattaharris.com, (563) 886-2187; www.lattaharris.com. Bob Krogmeier, bkrogmeier@lattaharris.com. Principals have strong backgrounds in tax accounting, financial consulting, and have strong interest in family business management and succession planning. McNutt is a well-respected consultant working in managerial accounting with larger scale family operations especially with pork producers. LHHP works with clients across the Midwest.

Lincoln Financial Advisors Agribusiness Services - **Dennis Henks**, **Art Littlefield, Tim Veazey and Megan Spain** - help family-owned farms and agribusinesses throughout the US to prepare and integrate future generations of business owners with financial, business succession and estate planning services. Contact Dennis at Overland Park, KS 66210; C-816-716-0881; O-913-323-3241; dennis.henks@lfg.com; Art at art.littlefield@ifg.com; Naperville, IL, 630-408-0110; Megan at megan.spain@lfg.com, cell (205) 229-6169 in Birmingham, AL; Tim Veazey, Rochester, NY timothy.veazey@lfg.com; 585356-8238.

Steve Lytle, Clearpath Family Advisors, www.clearpathfa.com, stevenjlytle@gmail.com, 503-724-4868, Steve works with leaders across the country on family business planning and management from his Portland, Oregon base. Specific work includes purpose, vision, values, mission, governance, family councils, team dynamics, personal leadership, conflict resolution, communication, generational transition, and succession planning.

Scott Mickey, Managing Partner, Agri-Directions (Sumter, SC), 803-418-9391, smickey@clemson.com; provides financial direction to agricultural businesses in risk management, financial performance, family business governance and monitoring financial and commodity marketing plans. Offers training on risk management and marketing plan development for producers, ag lenders, and crop insurance agents via Executive Marketing seminars. Scott has also served as a farm business consultant with Clemson University in SC since 1995.

Andrew Miles (Silver Lake, OR) applies his life experiences as a multigenerational farmer along with his experiences from a career in agriculture lending to help add value to family farm businesses. Andrew works with clients on tactical and strategic planning to enable the farm to meet ownership and management goals. Growing up on a farm and continuing to engage with ownership and management of a family farm business lend credibility to Andrew's rapport with clients in focusing on family succession planning, farm management, financial analysis, and policy creation. Contact: (541) 233-7261 andrew22miles@yahoo.com

Morsen Services, Inc, based in Owatonna MN and owned by Wally Thomas, serves farm and ranch businesses in MN, ND, SD, and Iowa. Wally was raised on a family farm in North Central North Dakota. He has served farm families for 40 years as an educator, banker, and consultant with the "Heart of A Teacher". Wally helps family farms achieve their succession planning objectives with positivity, focus and significance. wally@morsen.com; 507-676-2221.

Nichols Accounting Group —The Nichols Accounting Group has been serving the agriculture community for more than 46 years, working with family farm and ranch operators, and small businesses in the Pacific Northwest. Their focus is a holistic approach to the Family Farm Operation, implementing proven business management strategies to ensure sustainability of the generational family farm. They also specialize in growth optimization, tax, retirement, and estate planning, with an emphasis on a proactive forward focus. Office phone contacts are 541-881-1433, 208-442-0188, dlamm@nicholsaccounting.com & jderoin@nicholsaccounting.com. Web: www.nicholsaccounting.com

Northwest Farm Credit Services, Business Management Center (BMC); bmc@northwestfcs.com;
(866) 552-193; Michael Stolp, Senior Family Business Advisor and Carl Sohn, Senior Family Business Advisor. The BMC offers family business resources online and at in-person workshops and retreats. Family Business Advisors provide customized, one-on-one facilitation in strategic business planning, management succession, and communication. The BMC also offers economic insights, industry information, financial workshops, and professional development opportunities

Enterprising Generations LLC - Sherri Noxel, PhD, launched Enterprising Generations to strengthen family unity around succession planning. After 10 years directing the Oregon State family business education program and teaching more than 100 next generation family business leaders Sherri now works with family enterprise owners. She facilitates multigenerational conversations that are needed to build the family's farming future. snoxel@enterprisinggenerations.com; 971-727-7212; enterprisinggenerations.com

Transition Point Business Advisors is a family business advisory firm located in Des Moines, Iowa. Areas of expertise: succession planning, strategic planning, governance, managing family dynamics, and leadership development. Rena Striegel, President, is a contributor to Farm Journal's Legacy Project as well as other national publications dealing with farm transition. Transition Point works with clients throughout the US and can be contacted at: 515-225-4486 or info@transitionpointba.com; rena@transitionpointba.com

Steven Van Voorhis is based in the Rochester, New York area working as an independent consultant and also an affiliate of the Russell Consulting Group. He provides consultation services in financial management, risk management, peer group facilitation, and family business succession planning. He is also a 2011 TEPAP graduate. Contact: Steven.vanvoorhis7@gmail.com, (Wk) 585-746-1542

Weisenberger Agricultural Services, LLC – Pete Weisenberger has since 1984 provided management consulting and business strategy services for farms, ranches, forestry and other rural real estate businesses. Areas of focus: strategic planning, succession planning, investment planning, financial analysis, managerial and enterprise accounting, and real estate analysis. Contact: (601) 856-6373; pete.weis0956@gmail.com; P. O. Box 6888, Tyler, TX 75711-6888

WIPFLI CPAs & Consultants has offices throughout Montana and Idaho with professionals who focus on Agricultural tax, financial management and family business succession services. We have a deep understanding of the Agriculture Industry and a desire to help family operations stay in the family. Our unique approach aims to identify individual and business goals and collaborate with the client in order to develop a plan to achieve those goals. Contact **Dana Springer, dspringer@wipfli.com, Curtis Barnekoff, cbarnekoff@wipfli.com or Jeffrey Siler, jsiler@wipfli.com**

Andrew “Andy” Zenk, guides operations through complex issues of business transition, succession and estate planning, asset protection and business entity planning. Since 2007 Andy has helped clients build plans unique to specific goals and circumstances, striving to ensure financial, tax, legal and operational issues fit together and continue to work as time goes on. With a degree from University of Minnesota and a law degree with business concentration from Western Michigan University, he is licensed to practice law in Colorado, North Dakota, and Minnesota. Andy resides in Glenwood, MN with his wife, Laurie, and four children. Contact at: Andrew@zenk-law.com, 320-413-0362.

For a comprehensive listing of family business centers, professional firms and financial institutions serving family-owned businesses globally, visit the Directory of Advisers at www.familybusinessmagazine.com. See also www.familybusiness.ag for a listing of farm family business consultants who work together as a peer group.