



**Expert business guidance to help you make smart decisions about your farm, ranch, and renewable energy opportunities.**

REFA members get access to top-tier business advisory services through our partnership with Pinion Global. Whether you're evaluating a renewable energy project, planning for the next generation, or looking to strengthen your operation's financial foundation, these services help you make informed decisions that protect your land and livelihood.

## **Who this helps:**

Farmer and rancher landowners who want professional business guidance on:

- Financial impact of renewable energy projects
- Tax implications of lease payments
- Estate and succession planning with renewable income
- Business structure optimization
- Risk management and insurance strategies

## **Two Service Areas Available**

### **I. Advisory Services**

Get expert guidance on the business decisions that matter most to your operation's future.

#### **What you get:**

- **Free 30-minute assessment call** with Pinion's agricultural business experts
- Access to Pinion's knowledge base through phone, email, or meetings
- Initial consultations on any business concerns at no cost to members
- Professional project work available for additional fees (rates vary by project scope)

## **Service Categories:**

### **Financial Strategies**

- Strategic finance consulting for renewable energy decisions
- Business valuation services (helpful when considering development offers)
- Wealth management planning with renewable income streams
- Insurance strategies to protect your operation and renewable assets
- Retirement planning that incorporates lease payments

*Example: You're offered a solar lease but want to understand how the payments will affect your retirement planning and whether you should invest the income or use it for farm improvements.*

## Succession Planning

- Family business advising when renewable projects span generations
- Next generation and estate planning with long-term lease considerations
- Leadership development for multi-generational operations

*Example: Your wind lease runs for 30 years, but you want to retire in 10. How do you structure the lease benefits to help your children take over the farm while ensuring your retirement security?*

## Agricultural Consulting

- Farm program services and how renewable projects affect eligibility
- Land advisory including irrigation and tile mitigation for renewable projects
- Risk management strategies for operations hosting energy projects
- Sustainability planning that integrates renewable energy

*Example: You're considering a solar project but need to understand how it will affect your crop insurance, conservation programs, and long-term soil management plans.*

## 2. Accounting & Tax Services

Navigate the tax implications and accounting complexities of renewable energy income.

### What you get:

- **Free 30-minute assessment call** with Pinion's tax and accounting specialists
- Access to Pinion's tax knowledge through phone, email, or meetings
- Initial consultations on accounting and tax questions at no cost
- Professional services available for additional fees (rates vary by project scope)

### Service Categories:

#### Tax Compliance & Strategy

- Tax analysis and strategy for renewable energy lease payments
- Compliance with tax law requirements for energy income
- Deductions and credits advisory related to renewable projects

*Example: Your wind lease payments start next year. How should you structure them for tax efficiency? What deductions can you take for land modifications? How do lease payments affect your farm tax status?*

#### Accounting Services

- Accounting solutions for tracking renewable income separate from farm operations
- Integrated office solutions for managing multiple income streams
- Payroll and time management when renewable projects create new job responsibilities

*Example: You want to track your solar lease payments separately from your farming income for better financial planning, but you're not sure how to set up the accounting systems.*

## Delivered Through Our Partnership with Pinion

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REFA's business advisory services are delivered through our partnership with Pinion Global, a leading "Top 100" accounting firm and business advisory provider with over 90 years of experience in food and agriculture.

### Why Pinion:

- **Agricultural Focus:** Pinion specializes exclusively in food and agriculture, serving clients in all 50 states
- **Renewable Energy Expertise:** Deep experience helping farmers navigate renewable energy projects and their business implications
- **Comprehensive Services:** From tax strategy to succession planning, Pinion offers the full range of business services farmers need
- **Long-term Relationships:** 30% of their clients have partnered with them for 10+ years
- **Global Reach:** Serves domestic and international clients with offices across the United States and Australia

**Industry Experience:** Pinion works with commodity, permanent and specialty crop operations, livestock producers, equipment manufacturers, food processors, and renewable energy projects. Their team understands both traditional agriculture and the emerging renewable energy landscape.

## How It Works

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- **Contact REFA** using one of the methods below
- **Schedule your free 30-minute assessment** with Pinion experts
- **Get initial guidance** on your business questions at no charge
- **Decide on next steps** - if you need additional work, REFA can connect you with Pinion for project-specific services

### Important Notes:

- The free 30-minute assessment and initial consultations provide guidance and information
- Any follow-up work or detailed project assistance requires a separate agreement with Pinion
- Rates vary by project scope - REFA can connect you with Pinion for specific pricing
- Services complement but do not replace your existing CPA or financial advisor relationships

## Ready to Get Started?

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Contact REFA to access business advisory services

- **Phone:** 630-299-8615
- **Email:** [jannas@renewableenergyfarmers.org](mailto:jannas@renewableenergyfarmers.org)
- **Online Community:** Submit a service request