

CASE STUDY

# MORELAND FARMS

GROUNDING IN TRADITION, GROWING WITH STRATEGY: **HOW MORELAND FARMS HARVESTED SUCCESS**

## INDUSTRY

Agriculture & Regenerative Farming

## LOCATION

North-Central Oklahoma

## OWNERSHIP

Family-owned, led by Matt and Lisa Moreland, alongside their three sons

## CHALLENGE

Modernizing complex farm operations while ensuring a fair and sustainable transition to the next generation.

## SOLUTIONS

Adams Brown delivered forward-thinking tax strategies, financial clarity and multi-generational succession planning tailored to the unique needs of Moreland Farms.

## RESULTS

Adams Brown turned taxing complexities into seamless solutions, cultivating clarity down to the acre, equity for the next generation and the operational strength to fuel Moreland Farm's lasting growth.



For five generations, Moreland Farms has stood as a hallmark of blending innovation with tradition, cultivating a legacy in north-central Oklahoma. Their expansive 20,000-acre no-till operation produces more than just crops like corn, wheat and soybeans; it nurtures healthier soils while supporting sustainable farming practices. While also managing cattle and an excavation/construction business, "Moreland Farms 5" reflects the close-knit team of Matt, Lisa and their three sons working tirelessly to keep their family values at the operation's core.

But as the farm grew, so did its challenges. Tax preparation was a sprint against time, creating stress that rippled through the family. Financial clarity across multiple entities was murky at best and succession planning loomed as an urgent priority to protect their legacy for future generations.

Matt wanted more than numbers on a page. He needed an accounting partner to guide them from a bird's-eye view, helping them transform complexity into opportunity and their hard work into a sustainable future.

## The Challenge

By 2018, Moreland Farms had expanded across multiple lines of business, from regenerative crop production to cattle and construction. While rewarding, the growth brought unavoidable challenges. The family found themselves grappling with late tax filings, a lack of entity-specific financial insights and concerns over how to structure an equitable ownership transition for their three sons, who had recently joined the partnership.

Their prior accounting firm focused solely on reacting to yearly tax deadlines, rarely engaging with the unique needs of a growing, multi-generational operation. This left the Morelands burdened with guesswork and stress, particularly around complex tax liabilities and long-term planning.



***Sometimes you outgrow accounting firms, and others you don't feel like you are being supported as needed. We moved to a big agriculture accounting firm and were charged a lot of money, but never felt the people on our account were interested in knowing what we were doing or understanding us."***

**– Matt Moreland**

## The Solution

### Planting the Seeds for Long-Term Prosperity

Adams Brown embraced the unique complexities of Moreland Farms with a boots-on-the-ground approach.

First, they transformed tax planning from a rushed, last-minute ordeal to a proactive, year-round dialogue. By anticipating tax liabilities months in advance, Adams Brown freed the family from the stress of juggling deadlines during planting or harvest season.

For succession planning, Adams Brown recommended LLC structures to properly align ownership among Matt, Lisa and their three sons. This ensured fairness and harmony across the family and sustainability for the farm itself.

Lastly, a business valuation gave the Morelands a robust understanding of where they stood financially, unlocking opportunities they hadn't yet considered and equipping them to explore future investments and growth.

***"Adams Brown didn't just meet us in the office; they met us in the fields. They tailored every strategy to our farm's needs, helping us plan for what's next."***

*– Matt Moreland*

## Services that Deliver Results

By blending financial expertise with a deep understanding of farming life, Adams Brown provided actionable clarity and created a roadmap for thriving far into the future.

- ▶ **Tax Expertise:** Simplified compliance and minimized liabilities.
- ▶ **Succession Planning:** Developed LLC frameworks that reflect family values and fairness.
- ▶ **Business Valuation:** Produced transparent reporting to support growth and financial strategy.
- ▶ **Ongoing Guidance:** Became a team who's there at the deadline AND all year round.



## Solution Summary

- ▶ Reimagined tax season with proactive, under-control filings.
- ▶ Created succession plans that balanced equity with sustainability.
- ▶ Opened pathways for expansion through robust financial evaluations.

## The Impact

For Moreland Farms, financial jitters are a memory of the past. Tax seasons run smoothly. Their business flows with better operational efficiency and insights that make reinvesting simple. Fair ownership structures mean their sons, and their families, are set up for success, ensuring the farm's values remain for generations.

Best of all? They're seeing the results not just on spreadsheets but in upcoming plans to grow their legacy.

**"Knowing Adams Brown is behind us gives us confidence we're doing more than running a farm — we're building a future."** – Matt Moreland

## Looking Ahead

Looking to the horizon, Moreland Farms is preparing for its next chapter. Matt and Lisa are making plans to step back into quieter roles while empowering their sons to lead.

With Adams Brown as their trusted advisor, the Morelands are ready to explore opportunities to expand their business and even venture into new ag-related industries. Their story proves that when tradition is cultivated with the right tools and partnerships, it can grow into something extraordinary.

**"This story isn't just about our family. It's about showing what farming is capable of when you pair heart with the right team and tools."** – Lisa Moreland

Moreland Farms is proof that when tradition meets strategy, greatness grows. By weaving the innovation of Adams Brown's financial guidance with their generations-deep commitment to the land, the Morelands have cultivated a legacy beyond farming.

To learn more about their story and get inspired by their impact, visit [morelandfarms5.com](https://morelandfarms5.com).

