Beginning Farmer Retirement Plan

A retirement plan template for beginning farmers. It lists goals, income sources, and timing so a farm owner can discuss options with a financial adviser.

Farm / unit: _____ Date: _____ By: _____

Retirement goals

Planned retirement timing

Income sources expected

Savings and accounts

Farm assets role

Health care needs

Successor plans

Advisor contacts

Review schedule

TIP Review the plan with a licensed financial adviser and tax professional each year.