Farm Estate Planning Checklist

A checklist for farm estate planning. It lists the documents and questions to bring to an attorney so farm assets pass on as intended. Print a fresh copy for each project.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
Will in place and current	☐	☐	☐
Power of attorney documents	☐	☐	☐
Health care directives	☐	☐	☐
Farm ownership documents	☐	☐	☐
Land titles and deeds	☐	☐	☐
Business entity papers	☐	☐	☐
Beneficiary designations	☐	☐	☐
Life insurance review	☐	☐	☐
Attorney and accountant contacts	☐	☐	☐

NOTES / REPAIRS NEEDED

TIP Confirm all estate and tax decisions with a licensed attorney and tax professional in your state.