Farm Heir Communication Template

A template for communicating farm plans with heirs. It gives structure to conversations about expectations, roles, and timing so everyone hears the same message. Keep it with your farm records.

Farm / unit: _____ Date: _____ By: _____

Date and attendees

Purpose of the conversation

Owner wishes and goals

Heir interests and questions

Roles and responsibilities

Concerns raised

Decisions made

Next steps and follow-up

Notes shared with attendees

TIP Send notes to everyone after each talk so nobody relies on memory.