Farm Legacy Planning Guide

A guide to farm legacy planning. It helps farm families describe what they want to pass on, including land, values, and knowledge, as well as the business itself.

Farm / unit: _____ Date: _____ By: _____

1. Define what legacy means to you
2. Record farm history and stories
3. List values to pass on
4. Name who will carry on the farm
5. Document key farm knowledge
6. Plan fair treatment of all heirs
7. Discuss plans as a family
8. Involve an attorney and advisor

YOUR NOTES

TIP Hold a relaxed family conversation first, then bring professionals in to turn wishes into documents.