Farm Succession Workbook

A workbook for farm succession planning. Families use it to record assets, goals, roles, and decisions so the next generation can take over with fewer surprises.

Farm / unit: _____ Date: _____ By: _____

Current farm owners _____

Successor candidates _____

Owner retirement goals _____

Successor goals _____

Assets to be transferred _____

Roles after the transfer _____

Training needed for successors _____

Advisors to involve _____

Target meeting dates _____

NOTES / CALCULATIONS

TIP Work through one page at a time with the whole family and share notes with your advisors.