Estate Planning Checklist for Farmers

A checklist of estate planning items for farm owners, from wills and titles to business papers. Helps families gather information to discuss with an attorney.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
Will and any trusts	☐	☐	☐
Power of attorney	☐	☐	☐
Health care directives	☐	☐	☐
Land titles and deeds	☐	☐	☐
Business entity papers	☐	☐	☐
Beneficiary forms on accounts	☐	☐	☐
Life insurance policies	☐	☐	☐
Debts and loan documents	☐	☐	☐
Location of key papers and passwords	☐	☐	☐
Advisers and contact list	☐	☐	☐

NOTES / REPAIRS NEEDED

TIP Review it with a licensed estate attorney, since state laws differ. Tell your family where the documents are kept.

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