Farm Succession Planning Workbook

A workbook outline for planning how a farm passes to the next generation, covering goals, roles, assets and talks with advisers. Helps families begin a hard conversation.

Farm / unit: _____ Date: _____ By: _____

Family goals and values

People involved and interested

Roles and responsibilities today

Assets to be transferred

Ways to transfer ownership

Income needs for retiring owners

Fairness among heirs

Advisers to consult

Timeline and next steps

TIP Hold the family meetings first and write down agreements. Confirm all legal and tax steps with an attorney and tax professional.