Farm Transfer Plan Template

A section outline for a written farm transfer plan, recording who will take over what and when. For families moving management or ownership to a successor.

Farm / unit: _____ Date: _____ By: _____

Current farm structure

Successor and training plan

Management transfer steps

Ownership transfer approach

Assets and debts involved

Retirement income for the older generation

Tax and legal review notes

Communication plan for the family

Timeline and review dates

TIP Share a draft with all affected family members, then confirm legal and tax details with a licensed attorney and tax adviser.