Forestry Estate Planning Checklist

A forestry estate planning checklist for woodland owners. Use it to gather records and questions for an attorney before planning how forest land passes on.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
Property deeds located	☐	☐	☐
Timber and land records	☐	☐	☐
Existing management plans	☐	☐	☐
Easements and leases noted	☐	☐	☐
Beneficiary wishes recorded	☐	☐	☐
Debts and loans listed	☐	☐	☐
Insurance policies listed	☐	☐	☐
Advisor contacts listed	☐	☐	☐
Attorney consulted	☐	☐	☐

NOTES / REPAIRS NEEDED

TIP Confirm all estate and tax matters with an attorney and a tax professional who understand woodland.