Horticulture Farm Succession Plan

A template for a horticulture farm succession plan. It outlines goals, roles, and steps; review with an attorney and an advisor. Print a copy for each season and keep the filled pages with your farm records.

Farm / unit: _____ Date: _____ By: _____

Family and farm goals

Current ownership and assets

Successor and roles

Training and transition steps

Timeline for handing over

Financial and tax questions

Legal documents needed

Review schedule and notes

TIP Work with an attorney, tax advisor, and your lender on the final plan.