Poultry Farm Estate Planning Checklist

A poultry farm estate planning checklist for gathering documents and questions for an estate attorney. Owners use it to get organized. It keeps the details in one place for later review.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
Will and trust documents	☐	☐	☐
Asset and debt list	☐	☐	☐
Farm entity and ownership papers	☐	☐	☐
Insurance policies	☐	☐	☐
Beneficiary designations	☐	☐	☐
Power of attorney and health directives	☐	☐	☐
Contract and lease copies	☐	☐	☐
Key contacts and passwords list	☐	☐	☐
Attorney and advisor meeting notes	☐	☐	☐

NOTES / REPAIRS NEEDED

TIP Estate rules vary by state, so confirm everything with an attorney and tax professional.