Swine Farm Estate Planning Checklist

Use this Swine Farm Estate Planning Checklist for gathering estate planning items for a swine farm. Work down the list each visit, mark what you checked, and note any item needing attention.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
List farm assets and titles	☐	☐	☐
Gather deeds and leases	☐	☐	☐
List debts and loans	☐	☐	☐
List livestock and equipment	☐	☐	☐
Review wills and trusts	☐	☐	☐
Note beneficiaries	☐	☐	☐
Review insurance policies	☐	☐	☐
Note business partners	☐	☐	☐
Gather advisor contacts	☐	☐	☐
Set a review date	☐	☐	☐

NOTES / REPAIRS NEEDED

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