

MY FARMLAND PLAN

YOUR LAND, YOUR GEORGIA

PLANNING FOR YOUR LEGACY

WORKSHEET

INSTRUCTIONS: Use this worksheet as you go through the *Your Land, Your Georgia: Planning for Your Legacy Guide* to begin planning for your farm transfer. Use it to make notes, ask questions, brainstorm ideas, and draft a timeline for execution.

1. Establish Your Values, Vision, and Goals for Your Farm

As you go through the questions in this section, write down your top values and goals for the farm.

2. Determine Your Needs

What do you already know about your financial situation and retirement needs? What documents and information do you need to gather?

3. Gather Information About Your Farm

As you go through the questions, make note of your answers below.

4. Identify Who Should be at the Table

List below who all will be included in your plans and decisions for the farm.

5. Choose Your Tools and Strategies

Make notes below on which tools might best suite your situation.

Business Tools:

Succession Tools:

Estate Planning Tools:

6. Conservation Options

Can conservation play a useful role in your farm transfer planning? What next steps will you take to learn more?

7. Select Service Providers

What professionals and service providers do you already have and who do you need to contact?

8. Finalize Your Plan

Draft a timeline of next steps and set a date for completion.