**Build Your Team Worksheet**

Name: Date:

Directions:

Use this worksheet to think about what kind of team you need to have a successful transfer. Review the key questions below and circle the team members you may need to connect with.

**Team Member: Accountant**

Will you need an accountant to have a successful transfer?

Key questions to ask yourself:

1. Will you benefit from having a professional help you track expenses and finances?
2. Will you have time to process taxes, employee payroll, or farm finances on your own?
3. Do you have, or will you gain the skill to process finances of a farm or ranch transfer?

Learn more:

* See Module 3 Assess Your Financial Situation

**Team Member: Attorney**

Will you need an attorney to have a successful transfer?

Key questions to ask yourself:

1. Will you be purchasing property or other assets that require attorney review?
2. Will you need support creating the right business structure?
3. Will you need additional contracts such as a will, operating agreement, or long-term lease?

**Team Member: Appraiser**

Will you need an appraiser to have a successful transfer?

Key questions to ask yourself:

1. Will you need to have an agricultural assessment for tax purposes?
2. Will you need to provide an appraisal for a lender?
3. Will you need advice on local zoning and other polices that affect agricultural sales?

**Team Member: Financial Advisor**

Will you need a financial advisor to have a successful transfer?

Key questions to ask yourself:

1. Will you need to plan for retirement?
2. Will you need to plan for education?
3. Will you need to plan for health care?
4. Will you need support in planning for funding to acquire or transfer your farm or ranch?

**Team Member: Mediator**

Will you need a mediator to have a successful transfer?

Key questions to ask yourself:

1. Will you be negotiating in a situation with possible conflict?
2. Will you be negotiating in a situation with significant power imbalances?
3. Will you be negotiating a situation that has not successfully transferred the farm or ranch in previous attempts?

**Team Member: Farmer and Rancher Network**

Will you need a strong network or farmers or ranchers to have a successful transfer?

Key questions to ask yourself:

1. Will you benefit from connections to resources, professional references, or tools?
2. Will you be moving from another area, and need help getting a sense of the area?
3. Will you benefit from understanding how other professionals in your field are thriving, or what challenges they are facing?

**Names and Contact Information for potential Team Members gathered during this training:**