**Build Your Team Information Sheet**

Farm or ranch transfers can be complicated, and even when they might seem simple it is a good idea to consult with professional advisors to guide you through the different parts of the process. These advisors become part of your team. They will protect your interests and help you navigate the various steps of the transfer. See the information below about the roles of various team members, then use the [Build Your Team Worksheet](https://farmlandinfo.org/tools/build-your-team-worksheet/) to plan who should be part of your team. The [Glossary of Business and Financial Terms](https://farmlandinfo.org/publications/glossary-of-business-and-financial-terms/) can also be a helpful reference.

**Accountant**

A Certified Public Accountant (CPA) or otherwise qualified accountant is a very important member of your farm or ranch transfer team. They can help you develop financial statements and track your expenses in preparation for the transfer. To find a suitable accountant seek recommendations from the people you know who are involved with agriculture in the area.

When looking for an accountant, try to find someone who:

* You trust
* Listens to you
* Has farm tax experience

**CONNECT**

[AICPA Directory – Find a CPA](https://us.aicpa.org/forthepublic/findacpa)

**Attorney**

If you don’t have an attorney already, consider finding one. A lawyer can review your transfer documents, provide legal advice, and draft legal contracts such as wills or leases for your specific farm or ranch transfer situation. Depending on whether your transfer involves land, the business, or personal property, a lawyer can help you prepare an agreement.

To find a lawyer that is willing to work with you, start by talking to other farmers in the area who have hired lawyers, especially those with similar types of operations to yours. If you belong to a farm organization, ask which lawyers frequently serve their members. If possible, call a local law school clinic related to agriculture or see if your state’s bar association has a directory of lawyers licensed in the state, or a phone number you can call to ask for referrals. Try to find an attorney who is:

* + Licensed in your state
	+ Experienced working with farmers and farm businesses
	+ Responsive
	+ Interested in and experienced with your farm or ranch transfer situation

**CONNECT**

[American Agricultual Law Assocation Member Directory](https://www.aglaw-assn.org/wp-content/uploads/AALA-2022-Q3-Public-Directory-FINAL.pdf)

**Appraiser**

An appraiser can help you estimate the value of your assets, conduct agricultural assessments for tax purposes, and offer advice on local policies that affect agricultural sales. There are several ways that appraisals are used in farm transfer situations, the most common being price negotiation, loan application, and estate settlements. Assessing real estate values can be complicated, so it is a good idea to use a professional appraiser.

When looking for an appraiser, try to find someone who is:

* Licensed in farm/ranch real estate
* Knowledgeable about the local agricultural economy
* Knows how local zoning and other policies affect agriculture land values

**CONNECT**

[American Society of Farm Managers and Rural Appraisers](https://www.asfmra.org/directory/find-experts2)

[Certified general real property appraisers in good standing](https://www.asc.gov/appraiser/advanced?field_first_name__value_op=contains&field_first_name__value=Gatlin&field_last_name__value_op=contains&field_last_name__value=Fenwick&field_state_name_value=All&field_license_number__value=&field_is_license_active__value=All&field_meets_board_criteria__value=All&field_city__value=&field_zip__value=&field_county__value=&field_company_name__value_op=contains&field_company_name__value=&field_is_public__value=1&field_discipline_action_type_value=All&field_state_name_value_1%5BWyoming%5D=Wyoming&items_per_page=20&sort_bef_combine=title_ASC&submit=Apply)

[Appraisal Institute](https://ai.appraisalinstitute.org/eweb/DynamicPage.aspx?webcode=aifaasearch)

[National internet directory - Real Estate Appraisers](https://www.appraiserhub.com/)

Email NRCS.NationalAppraisers@usda.gov

**Financial Advisor**

Analyzing past as well as current business performance and making projections for the future are important considerations for both you and the incoming farmer. A financial advisor takes a neutral view of your operation and gives recommendations for investments, ways to cut back on expenditures, and help you anticipate future needs. They will help you plan for retirement, health care expenses, and any potential funding you may need to transfer your farm or ranch. They can also help you with cash flow analysis and tax planning.

To find a financial advisor, you can contact your state or local Farm Bureau or Farm Credit institution. Commercial banks often offer financial planning or advising services, but depending on where you are located, they may not know much about agriculture. As with the other potential advisors, it’s always good to ask other farmers or ranchers and people you know to find someone who is a good fit for your needs.

When looking for a financial advisor, try to find someone who:

* Has farm/ranch finance experience
* Is certified as a financial planner
* Listens and explains things clearly
* You trust

**Mediator**

Mediators are conflict management consultants who are perceived as neutral and fair. They are trained in effective communication and will respect all parties involved in a conflict or dispute. They do not take sides, make judgements or issue decisions, but help guide the parties toward a win-win resolution.

In the case of a farm or ranch transfer, mediators help resolve problems that may threaten a farm’s succession or the transfer process. These problems may be interpersonal, financial stress, or emotional conflicts

The USDA Farm Service Agency (FSA) – Certified Mediation Program provides resources and contact information for certified agricultural mediators by state.

When looking for a mediator, look for someone who:

* Has integrity and sensitivity
* Listens well
* Has strong communication skills
* Can define and clarify issues

 **CONNECT**

[USDA Farm Service Agency State Mediation Programs](https://www.fsa.usda.gov/programs-and-services/certified-mediation-program/certified-mediation-states/index)