

Date: _____ Location: _____ Name: _____

Challenges in Farm Management Transition Planning

Challenge	Applicable – If applicable describe observations/Not Applicable	Follow up ideas or actions needed	By Who? When?
Lack of Awareness			
Getting started			
Planning drift			
Avoidance/Denial			
Commitment			
Accountability			
Selfishness vs. Selflessness			
Estate plan gaps			
Goals and values			
Fears			
Fair versus equal			
Active and non-active children			
Entitlement			
Successor training and skill set			
Compensation			
Communication			
Management			
Tax planning			
Risk			
Process facilitation			