

Family-Owned Farm Estate Planning Questionnaire

1. Contact Information

Full Name

Address

Phone

Email

2. Family Members

Spouse/Partner Name

Children (List names and ages)

Other Dependents

3. Farm Information

Farm Name

Location

Size (Acres)

Type of Operation (Crops, Livestock, etc.)

Year Acquired

Ownership Structure (Sole, Partnership, LLC, etc.)

4. Other Assets

List Additional Properties, Equipment, and Investments

5. Debts & Liabilities

Mortgages, Loans, and Other Debts

6. Succession Planning

Intended Heirs or Successors

Special Instructions or Wishes for Succession

7. Advisors

Attorney Name & Contact

Accountant Name & Contact

Other Advisors

8. Additional Notes

Other Information or Concerns

