Land As Your Legacy® Transition planning checklist

Make the most of our first meeting

To determine the best plan for your farm or ranch, we need to review your current financial situation. Please bring the minimum required information to our first meeting.

Minimum required information to start the discussion:
Current balance sheet (business and personal)
  - Tax returns (last 2 years)
  - Planning documents (wills, trust, etc.)

Get even more out of your first Land As Your Legacy meeting by bringing the following information:

**Brokerage statements**
- Bank statements
- Pension statements
- Social Security benefit estimate

**Debt**
- Equipment/machinery debt
- Notes payable to you
- Operations line of credit
- Real estate debt

**Employer benefits**
- Company-sponsored group benefits (health, life and disability)
- Company-sponsored qualified retirement plan

**Insurance policies**
- Auto and homeowners insurance
- Farm insurance
- Life insurance
- Long-term care (LTC) policies
- Umbrella policies

**Land and real estate**
- Deeds or land contracts
- Mortgages
- Oil, gas and mineral interest

**Legal — corporate or commercial**
- Articles of incorporation and bylaws
- Buy/sell agreements
- Operating agreements

**Legal — individual**
- Durable powers of attorney
- Health care powers of attorney
- Wills and trust documentation

Please include any additional information that would provide a comprehensive view of your operation and where you stand in terms of transition planning. We look forward to working with you on your farm or ranch transition plan.