



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.

• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution • Not insured by any federal government agency • May lose value

Life insurance is issued by Nationwide Life Insurance Company or Nationwide Life and Annuity Insurance Company, Columbus, Ohio. Nationwide, the Nationwide N and Eagle, Nationwide is on your side and Land As Your Legacy are service marks of Nationwide Mutual Insurance Company.

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