

Lesson 2 Activity:

Check the Checklist

Print some copies of Factsheet 2: The Transition Planning Checklist. Share this with your farm or ranch family or non-related business partners. It will give them a quick overview of what usually needs to be done when developing a generational transition plan.

Go through the list and “check” planning tasks you have already completed. Put a “P” next to those you have made some progress on. You may be surprised at how much you have done already. Or you might be just starting out. Don’t be overwhelmed by all the undone tasks. You will get there one step at a time!

Think about what your possible next steps are. Place an “N” next to those in the checklist. Talk with your family or partners about who can work on those management tasks. This can help you find your own role in the process and help others find their roles, too.

Keep the checklist handy and use it as your personal ‘roadmap’ to your farm or ranch transition plan.

