

## **Checklist for Section #2 Your Family Future**

Complete the **Owner Intentions and Successor Intentions** worksheets.

Discuss the results with any spouse/partner and then with both owners and successors as a group.

Complete your **Core Values Clarification Exercise**. This will help define what you and your successor value.

Complete the **What Does Your Future Look Like?** Visioning is an important exercise to help you and your farm reach its potential.

Owner generation can complete the **How "Retired" Will You Be?** Taking time now to think about your later years can help ensure your retirement matches the lifestyle you envision.

Complete the **Is Equal Fair?** worksheet and discuss with spouse, partners, and family members as appropriate.

Discuss the transfer of management from owner generation to successor generation. Worksheets:

- Owner Generation: Maintaining Control of Management Decisions
- Successor Generation: Increasing Control of Management Decisions
- Transfer of Management Plan

**Evaluate the "D" risks.** This exercise can also help with issue development in Section 3 of this workbook.

## **Cultivating Your Financial Future**

This table can help you develop your action plan to accomplish the checklist tasks:

What (Action)	Who is Responsible	Completion Date

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