

Most farm families benefit from a supportive team of advisors and experts throughout the farm succession planning process and at certain key points during the actual transfer phases. The makeup of a team will depend on the unique circumstances of each farm. As a farm advisor, you will offer your own expertise. Be clear about what you can offer and where your professional boundary ends. Other experts and advisors will likely be necessary to round out each farm family's support team. This collaborative team approach to farm succession advising provides effective and efficient support.



### Who's in your network?

Use this chart to record the experts and advisors to whom you might turn for help in a farm succession case or those you might suggest a farm family add to their team.

In the second column, fill in the advisors you already know. You may list more than one organization, firm or person in a particular category. Make sure to identify yourself on this list.

Don't know of a resource? Use the third column to think about how you would identify or build out that part of your network.

Type of Advisor	Provider(s) Name	Plan to Obtain, if needed
Attorney (real estate, estate, tax, elder care)		
Financial advisor		
Farm business management consultant		
Accountant/tax planner		

Type of Advisor	Provider(s) Name	Plan to Obtain, if needed
Land use planner		
Land trust/conservation organization		
Lender		
Facilitator/coach		
Mediator		
Insurance agent		
Realtor		
Appraiser (land, business)		
Health care specialist		
Other:		
Other:		

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