

Farm Succession Planning Survey Template

All questions are optional. Follow each question's directions.
Write your answers to the open questions in the space provided.

Please answer from your own perspective about the farm's future. Every question is optional. Your answers do not create an agreement or assign responsibilities. Do not enter asset values, account details, legal documents or private information about another person.

1. Which description best matches your current involvement with the farm?

- ☐ I help manage day-to-day work
- ☐ I work on the farm without managing it
- ☐ I help with some tasks occasionally
- ☐ I am involved in family discussions but not farm work
- ☐ I am not currently involved
- ☐ Another description
- ☐ Prefer not to say

2. How much discussion have you personally had about the farm's future roles?

- ☐ None yet
- ☐ A brief informal conversation
- ☐ Several conversations with no agreed next step
- ☐ A conversation with an agreed next step
- ☐ An ongoing planning process
- ☐ Not sure
- ☐ Prefer not to say

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3. Which kind of future involvement would you like to explore?

- ☐ Day-to-day farm work
- ☐ Managing part of the operation
- ☐ Helping with business or administrative tasks
- ☐ A role outside farm operations
- ☐ No future role in the farm
- ☐ I am not ready to decide
- ☐ Another role
- ☐ Prefer not to say

4. What would you most want to understand before discussing a future role?

- ☐ What the role would involve
- ☐ Time commitments
- ☐ Skills I would need
- ☐ How decisions would be shared
- ☐ How my other plans could fit
- ☐ I need no further information now
- ☐ Something else
- ☐ Prefer not to say

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5. Which learning or preparation opportunity would be useful to explore?

- ☐ Observing a routine task
- ☐ Practicing a task with support
- ☐ Joining a planning discussion
- ☐ Learning about recordkeeping or administration
- ☐ Speaking with an independent adviser
- ☐ None at present
- ☐ Another opportunity
- ☐ Not sure

6. What arrangement would help you take part in a family discussion?

- ☐ An agenda shared beforehand
- ☐ Time to reflect privately first
- ☐ A neutral facilitator
- ☐ A chance to speak individually first
- ☐ A meeting time everyone agrees to
- ☐ No particular arrangement
- ☐ Another arrangement
- ☐ Prefer not to say

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7. What is one question the family should make space to discuss next?
