

A Family Legacy: Succession Planning for Farm, Ranch, and Woodland Owners

Rating Your Assets on the “Heirloom” Scale

Name(s): _____

Business Name: _____

1 = My property is one of the financial assets in my portfolio and nothing more.

10 = My property is a priceless heirloom to be protected for future generations at all costs.

Please write your thoughts about the long-term purpose of your assets. (Turn the page sideways if it is easier to write that way)

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| | | | | | | | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Additional thoughts about “legacy”: