

WORKSHEET 1

Wooded Property and Estate Overview

PROPERTY INFORMATION

ADDRESS/LOCATION				COUNTY
TOTAL ACRES	WOODED ACRES	DATE OF LAST APPRAISAL	LAST APPRAISED VALUE OF PROPERTY	ESTIMATED CURRENT VALUE
HOLDER(S) OF TITLE				
AMOUNT OWED		VALUE OF STANDING TIMBER	DATE OF MOST RECENT TIMBER CRUISE	DISTANCE FROM NEAREST INCORPORATED CITY
IS THERE A MANAGEMENT PLAN?	GENERAL PROPERTY MANAGER	EMPLOYEES		CONTRACTORS
NEIGHBORING USES				

ACREAGE TOTAL

PARCEL ID	TAX MAP ID	ACRES	ZONING	DATE ACQUIRED	CURRENT VALUE	BASIS

WOODLAND (ACRES)

MERCHANTABLE TIMBER	PRE-MERCHANTABLE TIMBER	PLANTATIONS (<10 YEARS OLD)	UNDERSTOCKED	OTHER

HARVEST HISTORY

YEAR	STUMPAGE VALUE (\$/MBF*)	VOLUME (MBF)	VALUE

*MBF = THOUSAND BOARD FEET EITHER IN DOYLE OR INTERNATIONAL ¼ INCH

TREE PLANTING HISTORY

YEAR	PARCEL	ACRES	# SEEDLINGS/ACRE	SPECIES

ROADS

YEAR	PARCEL	LENGTH	COST	CONTRACTOR

LAND RENTAL

PARCEL	TENANT (NAME & CONTACT)	RENT	DUE DATE

BUILDINGS / MACHINERY / EQUIPMENT

ITEM	MAKE/MODEL	YEAR PURCHASED	PURCHASE PRICE	OWED	APPRAISED VALUE

Adapted with permission from *Ties to the Land* (Bentz et al. 2012)

BANK ACCOUNTS

ASSET	BANK OR COMPANY	ACCOUNT NUMBER	AMOUNT
SAVINGS			
CHECKING			
CERTIFICATES OF DEPOSIT			
OTHER _____			

RETIREMENT

ASSET	COMPANY POLICY NUMBER	BENEFICIARY	VALUE
MUTUAL FUNDS			
LIFE INSURANCE			
EMPLOYEE BENEFITS			
OTHER _____			

MOTOR AND RECREATIONAL VEHICLES

ITEM	MAKE/MODEL	YEAR PURCHASED	PURCHASE PRICE	OWED	APPRAISED VALUE

JEWELRY / GEMS / PRECIOUS METALS

ITEM	DESCRIPTION	YEAR PURCHASED	PURCHASE PRICE	OWED	APPRAISED VALUE

TOTAL ESTATE VALUE	
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WORKSHEET 2

The Heirloom Scale

Where are you on the heirloom scale? Select which number, from 1 to 10, that best reflects your feelings about your land. Include your thoughts as to why this is where you are on the scale. What would move you up or down the scale? And have everyone involved revisit the scale every five years. As people age, their place on the scale may change.

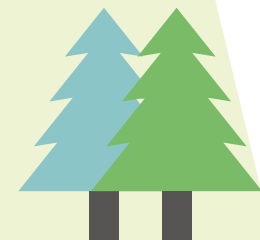
NAME	
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1	THOUGHTS
2	THOUGHTS
3	THOUGHTS
4	THOUGHTS
5	THOUGHTS
6	THOUGHTS
7	THOUGHTS
8	THOUGHTS
9	THOUGHTS
10	THOUGHTS

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



10 = My property is a priceless family heirloom to be protected at all costs



Adapted with permission from *Ties to the Land*

WORKSHEET 4

Assessing Potential Heirs

NAME		
LOCATION	PROXIMITY TO LAND	COULD THIS POTENTIALLY CHANGE IN THE FUTURE?
HOW ENGAGED ARE THEY WITH YOUR LAND?	WHERE ARE THEY ON THE HEIRLOOM SCALE WITH RESPECT TO YOUR LAND?	WHAT ARE THEY INTERESTED IN?
IS THERE A WAY TO ENGAGE THEM WITH YOUR LAND AROUND THOSE INTERESTS?		

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LOCATION	PROXIMITY TO LAND	COULD THIS POTENTIALLY CHANGE IN THE FUTURE?
HOW ENGAGED ARE THEY WITH YOUR LAND?	WHERE ARE THEY ON THE HEIRLOOM SCALE WITH RESPECT TO YOUR LAND?	WHAT ARE THEY INTERESTED IN?
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WORKSHEET 5

The Family Meeting

MEETING DETAILS

LOCATION		HOST
DATE	TIME	CHAIRPERSON

INVITEES

NAME	DATE OF PRELIMINARY PHONE CALL	DATE INVITATION SENT	DATE OF FOLLOW-UP PHONE CALL	RSVP
				___ YES ___ NO
				___ YES ___ NO
				___ YES ___ NO
				___ YES ___ NO
				___ YES ___ NO
				___ YES ___ NO
				___ YES ___ NO
				___ YES ___ NO
				___ YES ___ NO

INVITATION WORDING:

MEETING AGENDA:

WORKSHEET 6

Strategies for Moving Forward

LEGACY PLAN

KEY STRATEGIES

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STRATEGIES REJECTED

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WORKSHEET 7

Who Does What on Your Land

JOBS ON YOUR LAND

JOB TITLE	NAME	JOB DESCRIPTION	COMPENSATION	MAKES DECISIONS ABOUT THE PROPERTY	WHEN/HOW OFTEN
MANAGER				___ YES ___ NO	
BOOKKEEPER				___ YES ___ NO	
MAINTENANCE				___ YES ___ NO	
				___ YES ___ NO	
				___ YES ___ NO	

THE PROFESSIONALS YOU WORK WITH

TYPE	ROLE	NAME	ADDRESS	PHONE	EMAIL
FORESTER					
WILDLIFE BIOLOGIST					
LAWYER					
ACCOUNTANT					

ANNUAL/RECURRING ACTIVITIES

MONTH	ACTIVITY DESCRIPTION	WHO DOES IT	WHEN	WHAT TO DO
	Pay property taxes			
	Pay bills			
	Maintain equipment			

PERMITS

TYPE OF PERMIT	PROVIDER	WHY NECESSARY	WHEN

WORKSHEET 8

Your Legacy Planning Team

ACCOUNTANT

NAME		APPOINTMENT DATE / SCHEDULE:
MAILING ADDRESS	PHONE	EMAIL
WHY WE WANT THEM ON THE TEAM		

LAWYER

NAME		APPOINTMENT DATE / SCHEDULE:
MAILING ADDRESS	PHONE	EMAIL
WHY WE WANT THEM ON THE TEAM		

FINANCIAL / INVESTMENT EXPERT

NAME		APPOINTMENT DATE / SCHEDULE:
MAILING ADDRESS	PHONE	EMAIL
WHY WE WANT THEM ON THE TEAM		

FAMILY BUSINESS CONSULTANT

NAME		APPOINTMENT DATE / SCHEDULE:
MAILING ADDRESS	PHONE	EMAIL
WHY WE WANT THEM ON THE TEAM		

CONSULTING FORESTER

NAME		APPOINTMENT DATE / SCHEDULE:
MAILING ADDRESS	PHONE	EMAIL
WHY WE WANT THEM ON THE TEAM		

OTHER

NAME		APPOINTMENT DATE / SCHEDULE:
MAILING ADDRESS	PHONE	EMAIL
WHY WE WANT THEM ON THE TEAM		

WORKSHEET 9

Legal, Financial, and Conservation Instruments

WILL

DATE COMPLETED	LOCATION OF ORIGINAL DOCUMENT
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OWNERSHIP STRUCTURE

DATE COMPLETED	LOCATION OF ORIGINAL DOCUMENT
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OPERATING AGREEMENT

DATE COMPLETED	LOCATION OF ORIGINAL DOCUMENT
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BUY-SELL AGREEMENT

DATE COMPLETED	LOCATION OF ORIGINAL DOCUMENT
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CONSERVATION EASEMENT

DATE COMPLETED	GRANTEE
LOCATION OF ORIGINAL DOCUMENT	

LIFE INSURANCE POLICY

COMPANY	AGENT	POLICY NUMBER
LOCATION OF ORIGINAL DOCUMENT		DATE

LONG-TERM CARE INSURANCE POLICY

COMPANY	AGENT	POLICY NUMBER
LOCATION OF ORIGINAL DOCUMENT		DATE

OTHER LEGAL DOCUMENTS

DOCUMENT: _____

DATE COMPLETED	LOCATION OF ORIGINAL DOCUMENT
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DOCUMENT: _____

DATE COMPLETED	LOCATION OF ORIGINAL DOCUMENT
----------------	-------------------------------

DOCUMENT: _____

DATE COMPLETED	LOCATION OF ORIGINAL DOCUMENT
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DOCUMENT: _____

DATE COMPLETED	LOCATION OF ORIGINAL DOCUMENT
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DOCUMENT: _____

DATE COMPLETED	LOCATION OF ORIGINAL DOCUMENT
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LAND USE-VALUE ASSESSMENT

COUNTY	TAX MAP PARCEL	ACRES	CATEGORY	DATE ENROLLED	REVALIDATION DATE

AGRICULTURE / FORESTAL DISTRICT

COUNTY	TAX MAP PARCEL	ACRES	AFD NAME	DATE ENROLLED	TERM LENGTH