

FARMS: Farm Asset & Resource Management Spreadsheet



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The emotional loss of a loved one is an extremely difficult time for families; especially for farm families. We can make it easier by having all our important information summarized in one document. This planning spreadsheet allows you to summarize your assets and how each is owned, valued, and titled. This information along with your liabilities will be needed by your attorney or estate planning professional as you plan your estate. The location of important documents and agreements can be listed as well as a summary of farm and personal advisors. Your personal wishes for your funeral can also be expressed. The information also will be helpful to your executor(s) as they settle your estate.

What is Included? This spreadsheet is designed to help you pull all your critical information together so that you are better equipped to complete a succession and estate plan. The Excel workbook contains 18 sheets to use as you document your estate. Each of the tabs can be accessed by clicking on each tab on the bottom of the Excel workbook

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Safeguarding the Information: When you are finished with your entries, print the completed document. Due to the confidential information contained in the document, it is recommended it be placed in a secure location such as your lawyer's office or a safe deposit box. It is important that your spouse and ancestors know where the document is and have been given permission to access it in the case of an emergency or death.

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