

Building Your Transition Team: Interview Form

Instructions

Print this worksheet before you sit down to meet with potential (or existing) members of your Transition Team. Ask them the questions below as well as some of your own. Write down what you talked about, any decisions that were made, etc. so you can keep your ducks in a row and easily remember the details! Review the worksheet's instructional video for more tips.

Transition Team Member: What's their role?

- | | | |
|--|---|---|
| ☐ Accountant/ Tax Preparer | ☐ Farm/Ranch Manager | ☐ Real Estate Agent |
| ☐ Appraiser | ☐ Family member (heir) | ☐ Trustee |
| ☐ Attorney | ☐ Financial Advisor/Planner | ☐ Other: |
| ☐ Doctor/ Psychologist | ☐ Insurance Agent | ☐ Other: |
| ☐ Facilitator/ Mediator | ☐ Loan Officer/Banker | ☐ Other: |

Name: _____

Business Name: _____

Telephone: _____ Fax: _____

Email: _____

Office Address: _____

Mailing Address: _____

Record of contact:

Date	Purpose

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Questions

- 1) What is your experience in agricultural farm/ranch family transitions? How long have you been in this business?

- 2) In what states or counties do you practice?

- 3) What steps can I expect to take in working with you?

- 4) How much should I plan on paying for your services? Do you charge a retainer? If so, how much? How do you charge for your time? How much?

- 5) Do you charge for any other services? (Some charge rates for "soft costs" for copying, mailing, faxes, etc.)

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- 6) If something should happen to you, are there others in your practice who can continue to help me?

- 7) How will information be shared with me? E-mails, printed documents, through a portal account?

- 8) I am concerned about cybersecurity and theft in general, how do you keep my information safe and confidential?

- 9) How would we work together? Via in-person meetings or through a combination of in-person and virtual meetings?

- 10) Can you provide a few recent references from folks who you helped successfully work through an agricultural exit / estate planning process?

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11) Record other questions and notes here:

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.