

Discovery Communication

Complete and return this form prior to your first succession planning meeting with Carrick Aland.

TELL US ABOUT YOU AND YOUR FAMILY

Where do you sit in the family tree?

- Parent
- On Farm Child
- Off Farm Child
- Other – Please describe

What is your age group?

- Under 30
- 30 - 45
- 45 - 60
- 60 – 75
- Over 75

Please identify the generations that draw their livelihood from the farm:

- Parents only
- Parents and the family of one on farm child only
- Parents and the family of more than one on farm child
- Other: _____

Are there Off Farm children that need to be considered in the succession plan?

- Yes, One Off Farm Child
- Yes, More than one Off Farm Child
- No

To date, family consideration of the issues surrounding succession planning has resulted in:

- No discussion – we do not know where to start
- Discussion, but the momentum has been lost with no agreement
- Discussion, but no agreement due to family conflict
- Discussion and conceptual agreement but there has been a failure to implement

TELL US ABOUT YOUR FARMING ENTERPRISE

How would you best describe the activity of your Farming Enterprise:

- Cattle Grazing
- Dryland Cropping
- Mixed Grazing and Dryland Cropping
- Irrigated Cropping
- Mixed Dryland and Irrigated Cropping
- Other: _____

Who is involved as the proprietors of the Farm Operating Enterprise?

- Parents Only
- Parents and On Farm children
- Parents, On Farm Children and Off Farm Children
- The enterprise operates through a Family Trust or Company

How are farming properties titles held?

- In the names of Parents Only
- In the names of Parents and On Farm Children
- In the names of Parents, On Farm Children and Off Farm Children
- In the name of a Family Trust or Company

Relative to farm property market values, what is the approximate level of commercial debt?

- Less than 10%
- 10% - 30%
- 30% - 50%
- Greater than 50%

Relative to farm property market values, what is the approximate level of Off Farm Assets?

- Less than 5%
- 5% - 25%
- Greater than 25%

Rural and Small Business Financial Specialists



Liability limited by a scheme approved under Professional Standards Legislation.

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