

Who Will Fill My Shoes: Succession Planning for Landowners and Businesses

MODULE 3. LEGAL AND FINANCIAL INSTRUMENTS

Record the legal and financial documents or instruments that make up your estate plan and their location. Feel free to cross out unused items or add more that are necessary for your plan and you may want to make notes about why you chose a specific instrument for your plan.

Will

Location of document	Date completed
Bequest lists	
Notes	

Life Insurance Policy

Location of document	Date completed
Company	Policy #
Agent	Contact info
Notes	

Health Insurance Policy

Location of document	Date completed
Company	Policy #
Agent	Contact info
Notes	

Long-Term Care Policy

Location of document	Date completed
Service provider	Contact info
Notes	

Ownership Structure

Location of document	Date completed
Name	Ownership
Owners	
Notes	

Operating Agreement

Location of document	Date completed
With	
Notes	

Buy-Sell Agreement

Location of document	Date completed
With	
Notes	

Trust

Location of document	Date completed
With	
Notes	

Conservation Easement

Location of document	Date completed
With	
Notes	

Other Legal Documents

Document	
Location of document	Date completed
Notes	

Document	
Location of document	Date completed
Notes	

Document	
Location of document	Date completed
Notes	

Notes

Adapted from: Smith, K and Cushing, T. (2024). Keeping the Land: Succession Planning for Landowners. NC State Extension.