

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

## MODULE 2. YOUR TEAM OF ADVISORS

This form records important information about your advising team. Include their contact information and why they are a valuable addition to your team (long-term family advisor, highly qualified, knowledgeable).

Record important information about your advising team. Include their contact information and why they are a valuable addition to your team (ex. long-term family advisor, highly qualified, knowledgeable, etc.).

### Attorney

Name	
Address	
Phone	Email
How long in this role for you?	
Why?	

### Accountant

Name	
Address	
Phone	Email
How long in this role for you?	
Why?	

### Financial Advisor

Name	
Address	
Phone	Email
How long in this role for you?	
Why?	

### Insurance Agent

Name	
Address	
Phone	Email
How long in this role for you?	
Why?	

### Consultant

Name	
Address	
Phone	Email
How long in this role for you?	
Why?	

**Other**

Name	
Address	
Phone	Email
How long in this role for you?	
Why?	

**Other**

Name	
Address	
Phone	Email
How long in this role for you?	
Why?	

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