

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

MODULE 4. SUCCESSOR AND ORGANIZATIONAL ASSESSMENT

This form will help you assess the individuals or organization you plan to include in your plan. For individuals, consider their age, heirs, character traits, needs, and life situation. With an organization, it is important to consider its mission, values, and conditions for accepting land.

Assess the individuals or organization you want to include in your plan. For individuals, think about their age, heirs, character traits, needs and life situation. For an organization, consider its mission, values, and conditions for accepting land. Be honest in your assessments.

For each individual successor, evaluate the following:

Name	Relationship to you
Address	
Current role or engagement in land / business management (if applicable)	
If you have multiple successors, have you considered how you will divide your estate? What will this successor receive?	

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Address	
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Address	
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If you have multiple successors, have you considered how you will divide your estate? What will this successor receive?	

For each potential organization (conservation, charity, or university), complete the following:

Organization	Website
Contact info	
Address	
What kind of donation will they accept? If so, what are their conditions for accepting land? Do these conditions align with your stewardship and legacy goals? Do they align with your values?	

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