

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

MODULE 4. YOUR SUCCESSION PLAN TIMELINE

You can record and retain your important dates or milestones for your succession plan.

Transition Timeline and Goals: record what you would like to see happen and when.

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Next year, the goal is to:

In two years, the goal is to:

In ____ years, the goal is to:

In ____ years, the goal is to:

In ____ years, the goal is to:

In ____ years, the goal is to:

Record important events for your succession plan here and check them off.

Annual Meeting

	Annual meeting / location	Date
	Prepare meeting agenda	Date
	Social event / location	Date
	Review succession plan	Date

Advisor Meetings

	Accountant	Date
	Attorney	Date
	Financial Advisor	Date
	Insurance Agent	Date
	Consultant	Date
	Consultant	Date
	Other	Date
	Other	Date
	Other	Date

Taxes

	Prepare statements (who)	Date
	Submit taxes (who)	Date

Annual Gifting (if applicable)

	Who / amount	Date
	Who / amount	Date
	Set date to make recurring gifts	Date

Notes

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