

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

## MODULE 5. MEETING LOGISTICS

Record the logistics of your meeting(s) — date, time, location, attendees, invitation rough draft, etc. Consider giving your invitees a range of dates to choose from but recognize that some simply may not be able to attend. You may also consider completing an agenda with designated ground rules while doing

this (see next handout) and attach them to the final meeting invitation so that your attendees can be more prepared for the meeting.

Location	Date and Time
Meeting host	
Meeting chair	
Who will take minutes / notes?	

Invitee	Date of First Call	Date Invite Sent	Date of Follow Up	RSVP

Other meeting considerations:

### SAMPLE INVITATION

Hi everyone, as you know, I/we are aging, and it feels like the right time to sit down with everyone and discuss what's going to happen to the farm/land/business after I/we are gone. It's my/our hope that we can get together soon and since we are all in driving distance (OR since we are not all close together, let's get together) around month day. I/We'd like to have lunch (or brunch) first and then a business meeting afterwards.

**When:** Day of week, Month, Day

**Where:** Local restaurant / office space / home

**What:** lunch at TIME, followed by meeting from TIME to TIME

Your families are more than welcome to stay and socialize at the house while we hold our meeting, and I/we would love to spend time with them later in the day. I/we suggest having dinner later as a large group. Also, please read the attached agenda and bring it to the meeting along with any questions

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