

SUCCESSION 101: *Farming Families Worksheet for Individuals*

This worksheet is designed to help at the individual level. This is about giving you clarity. It will help Identify your position on key issues. You will then be in a position to share this with your partner and family. Often simply knowing someone else understands where you are at can be a relief. It is important to know your partner has your back. It is much better to make time for important discussions then live with assumptions.

Remember men and women often have different priorities and viewpoints. It is not about changing other people. You do however, need to feel your position is respected and acknowledged. When completing this form and discussing your findings you need to remember the following:

- Feelings aren't right or wrong they simply express where you are at
- This can be a difficult conversation but the benefits make it worthwhile
- It is never good to spring this type of discussion on your partner
- If you can minimise the emotional responses than the communication will progress further than if you get into a victim, blaming or negative mindset

Q.1 What would I like from the family business?

Q.2 Currently, my expectations are...

Q.3 My top 3 issues/concerns about my future are...

Q.4 My reasons for feeling this way are...

Q.5 I believe a reasonable timeframe to finalise a succession plan is...

Q.6 I would feel we are progressing if...

Q.7 The most important thing for me right now is...