

Farm or Ranch Succession and Transition Readiness Assessment
FOR CURRENT OWNERS/OPERATORS

Ignore skips in question number sequence - the skips are to align with the Business Health Assessment.				
Select the number or letter of your best response from the "Answers" column. Enter a number in the "Number Score" column and a letter in the "Letter Score" column.			Numbered Scores	Letter Scores
A	BUSINESS FORMATION To assess if the farm or ranch is operated through an entity that can transfer ownership interests.			
A.1.0	Who owns your business? This is not referring to land, but to operations. If land and operations are owned the same answer for both here. If they are owned separately questions about land ownership are in Section B.	<input type="checkbox"/> A = I own it by myself. <input type="checkbox"/> B = I own it with my spouse. <input type="checkbox"/> C = I own it with other family members. <input type="checkbox"/> D = I own it with other people to whom I am not related by blood or marriage. <input type="checkbox"/> E = It is owned through a living trust or a family trust established as part of an estate plan.		
A.2.0	Have you formed a family limited partnership, a corporation, or an LLC to own your business?	<input type="checkbox"/> 0 = No and continue <input type="checkbox"/> 4 = Yes and skip to A.3.0		
A.2.1	Have you identified someone who will be able to continue your farming or ranching operations in the event you are incapacitated or deceased?	<input type="checkbox"/> 0 = No, I have not done this. <input type="checkbox"/> 1 = My family would take care of it - but we have never explicitly talked about it, it is just understood. <input type="checkbox"/> 2 = I have had a conversation with the person who I expect would take over operations and we understand the expectation, but there is nothing in writing. <input type="checkbox"/> 3 = Farming operations are formalized in a business entity and one of the other owners or one of the key employees would take over operations - but there is no formal plan for this. <input type="checkbox"/> 4 = Farming operations are formalized in a business entity and there is a written plan for what to do if any owner or key employee is incapacitated or deceased and we have discussed it so we all know what to do.		

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A.2.2	Does the operating agreement for the entity specify what will happen if an owner becomes permanently disabled or incapacitated and unable to continue working?	<input type="checkbox"/> 0 = No, or I do not know. <input type="checkbox"/> 1 = Yes, there is a provision for the other owners to buy the sick or injured owner out. <input type="checkbox"/> 2 = Yes, there is a provision for the other owners to buy the sick or injured owner out and owners are old also receive payments from one or more types of insurance (disability, workers comp, and health). <input type="checkbox"/> 2 = Yes, there is a provision for the other owners to buy out a sick or injured owner out over time so there will not be a sudden drain of cash from the business. <input type="checkbox"/> 3 = Yes, there is a provision for the other owners to buy out a sick or injured owner out over time so there will not be a sudden drain of cash from the business and all owners are covered by disability insurance, workers comp insurance and health insurance.		
A.2.3	Does the operating agreement for the entity specify what will happen to an owner's interests in the entity in the event of an owner's death?	<input type="checkbox"/> 0 = No, or I do not know. <input type="checkbox"/> 1 = Yes, the interests go to the other owners. <input type="checkbox"/> 2 = Yes, the interests would go to the owner's heirs. <input type="checkbox"/> 3 = Yes, the other owners would have to buy out the heirs, so the heirs would get cash but would not become owners. <input type="checkbox"/> 4 = Yes, the other owners would have to buy out the heirs, so the heirs would get cash but would not become owners, and we have life insurance on each other to help ensure that there will be enough cash in the business to do that.		
A.3.0	Do you understand that if you form a family limited partnership, an LLC or a corporation for your business it may make it easier to transfer ownership of your business during your life or upon your demise?	<input type="checkbox"/> 0 = No idea/have not heard of this. <input type="checkbox"/> 1 = I've heard of this, but don't understand it. <input type="checkbox"/> 2 = I understand a little. <input type="checkbox"/> 3 = I understand, but I don't know how to act on my knowledge. <input type="checkbox"/> 4 = I understand and am acting on my knowledge (i.e. already incorporated, or process started).		

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A.E.0	Are you in the process or transferring partial ownership of your business to someone else, or have you already done this?	<input type="checkbox"/> 0 = No. <input type="checkbox"/> 1 = Yes, we are talking about this. <input type="checkbox"/> 2 = Yes we formed a business entity (family limited partnership, LLC, etc.) to do this but have not yet transferred ownership. <input type="checkbox"/> 3 = Yes, we have transferred some ownership through gift or sale. <input type="checkbox"/> 4 = Yes, we have transferred some ownership through gift or sale and we are transferring management knowledge and authority.		
A.Z.1	How important is it to you to learn more about how and why to form a separate entity for your farm or ranch business?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		
B	LAND To assess if the transfer of the land addressed in the estate plan and if there might there be environmental compliance issues to address			
B.1.0	Do you own any of the land you farm or ranch?	<input type="checkbox"/> A = No and skip to B.2.0 <input type="checkbox"/> B = Yes		
B.1.1	Does your will or trust specify who will inherit your land?	<input type="checkbox"/> 0 = I do not have a will or a trust. <input type="checkbox"/> 1 = My will or trust says that my heirs get all of my property to divide equally. <input type="checkbox"/> 2 = My will or trust specifies which of my heirs will get which land, but also says that each heir gets an equal share of the total estate. <input type="checkbox"/> 3 = My will or trust specifies which of my heirs will get which land and there are other provisions to allocate my estate to my heirs in a way that is fair but not necessarily equal.		
B.1.2	How well would you say you understand the importance of planning for the transfer of land separately from the transfer of the farm business and operations?	<input type="checkbox"/> 0 = No idea/have not heard of this. <input type="checkbox"/> 1 = I've heard of this, but don't understand it. <input type="checkbox"/> 2 = I understand a little. <input type="checkbox"/> 3 = I understand, but I don't know how to act on my knowledge. <input type="checkbox"/> 4 = I understand and am acting on my knowledge - I am creating or already have an estate plan that addresses the transfer of the land separately from the transfer of the business.		

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B.2.0	Do you rent, cash lease or crop share any of the land you farm?	<input type="checkbox"/> 0 = No and skip to B.6.0 <input type="checkbox"/> 2 = Yes and continue		
B.2.1	Is your lease in writing?	<input type="checkbox"/> 0 = Yes, and skip to B.6.0 <input type="checkbox"/> 2 = No and continue		
B.2.2	If your lease is not in writing how will your heirs be able to continue accessing and farming that land if you are incapacitated or deceased?	<input type="checkbox"/> 0 = I do not know, I have not thought about this. <input type="checkbox"/> 1 = Nothing is in writing but I am confident in all the people and personal relationships involved that everyone will do the right thing and it will work out. <input type="checkbox"/> 2 = Even though it isn't in writing, the landlord understands the lease is with the whole company so any of the farm owners or employees would be able to keep farming there. <input type="checkbox"/> 3 = Now that I think about it I am going to make sure we have an agreement in writing to address this sort of situation.		
B.11.0	Is any of your land subject to an EQIP contract or enrolled in CSP, CRP or any other USDA conservation program?	<input type="checkbox"/> 0 = No and skip to B.15.0 <input type="checkbox"/> 2 = Yes and continue		

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B.11.1	If you are temporarily or permanently unable to continue in your role is there someone who has the knowledge and authority to continue to operate your land in accordance with your conservation program agreements?	<input type="checkbox"/> 0 = The person who would take over my role if I were incapacitated or deceased has not been identified. <input type="checkbox"/> 1 = The person who would take over my role if I were incapacitated or deceased has been identified but they do not have the knowledge or legal authority to act on my behalf to remain in compliance with USDA conservation programs. <input type="checkbox"/> 2 = Employees or family members know what to do to remain in compliance, but would not have the immediate legal authority to act on my behalf if I were temporarily or permanently unable to act on my own behalf. <input type="checkbox"/> 3 = The person who would take over my role if I were incapacitated or deceased has been identified, and they understand the conservation programs and have the legal authority to act to remain in compliance if I am unable to act on my own behalf.		
B.15.0	For land owners only: Is there a conservation easement on your land?	<input type="checkbox"/> No = go to B.15.1 <input type="checkbox"/> Yes = go to B.Z.1		

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B.15.1	Do you understand how a conservation easement works as a part of an estate plan?	<input type="checkbox"/> 0 = I do not have an estate plan and I do not know how a conservation easement would be part of an estate plan. <input type="checkbox"/> 1 = I do not have an estate plan but I know that a conservation easement can help with estate planning or with selling land. <input type="checkbox"/> 2 = I have an estate plan but I never considered a conservation easement as part of it and now I wonder if I should have. <input type="checkbox"/> 3 = I have an estate plan and I need help understanding if a conservation easement could also be a beneficial part of my estate plan. <input type="checkbox"/> 4 = I have an estate plan and I am confident that I understand if a conservation easement would or would not benefit my plan, and that my plan includes or does not include a conservation easement based on careful consideration of my goals and circumstances.		
B.Z.1	How important is it to you to learn more about how to plan for the transfer of your farm or ranch land?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		
B.Z.2	How important is it to you to learn more about how environmental compliance issues may affect my estate after I pass?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		
B.Z.3	How important is it to you to learn more about how conservation easements are used as part of estate plans?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		

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C	ACCOUNTING To asses if there is a system in place to support continuity of operations.		
C.1.1	Does someone other than yourself have check signing authority and the ability to access business checking and savings accounts to make deposits and transfer money if needed?	<input type="checkbox"/> 0 = No, I am the only person who can access those accounts or sign checks. <input type="checkbox"/> 1 = Another person has the authority to access the business accounts and sign checks but they are not currently active in the business and would not necessarily be in a good position to deal with money for the business if I were suddenly disabled or deceased. <input type="checkbox"/> 2 = Someone in the business can access these accounts and has enough knowledge to keep things going for a while, but they would not have actual legal authority to do so. <input type="checkbox"/> 3 = Someone has the ability to access the accounts, knows what to do, and has actual legal authority to act on my behalf if I am unable to do so.	

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C.2.0	Does the person you expect will take over your operation if you are incapacitated or deceased know how to access your accounting system and ensure that the operation continues to stay current with its accounting in the event you are incapacitated or deceased?	<input type="checkbox"/> 0 = The person who would take over my role if I were incapacitated or deceased has not been identified. <input type="checkbox"/> 1 = The person who would take over my role if I were incapacitated or deceased has been identified but they have not been given access to or trained on the accounting functions and they do not have accounting knowledge, or I do not know if they have enough accounting knowledge. <input type="checkbox"/> 2 = My bookkeeper or accountant will keep everything going but the person who would take over my role does not know about this part of the business. <input type="checkbox"/> 3 = The person who would take over my role if I were incapacitated or deceased has been identified, and they have received some training, and they have some knowledge of this function, but it would be good if they had more training or knowledge in this area. <input type="checkbox"/> 4 = I am 100% confident that the person who would take over my role if I were incapacitated or deceased has the training and knowledge they need to function in this role if required.		
C.Z.1	How important is it to you to learn more about how to ensure that your financial operations will continue smoothly during your temporary or permanent absence?	<input type="checkbox"/> 0 = Not important <input type="checkbox"/> 1 = Somewhat important <input type="checkbox"/> 2 = Important but not a priority <input type="checkbox"/> 3 = Important <input type="checkbox"/> 4 = Very important/high priority		
D	TAXATION Issue: Ensure the transition or estate plan adequately addresses income and estate tax issues.			

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D.E.0	Does the person you expect will take over your operation if you are incapacitated or deceased know how to access your accounting and tax information and how to work with your existing tax preparer or tax preparation system to ensure that the proper income tax returns are timely filed if you are temporarily or permanently unable to do so?	<input type="checkbox"/> 0 = The person who would take over my role if I were incapacitated or deceased has not been identified. <input type="checkbox"/> 1 = The person who would take over my role if I were incapacitated or deceased has been identified but they would not know anything about how to get the income taxes done. <input type="checkbox"/> 2 = My bookkeeper or accountant will keep everything going but the person who would take over my role does not know about this part of the business. <input type="checkbox"/> 3 = The person who would take over my role if I were incapacitated or deceased has been identified, and they have received some training, and they have some knowledge of this function, but it would be good if they had more training or knowledge in this area. <input type="checkbox"/> 4 = I am 100% confident that the person who would take over my role if I were incapacitated or deceased has the training and knowledge they need to function in this role if required.		
D.E.1	Have you discussed planning to avoid estate taxes with a licensed and qualified expert in farm estates?	<input type="checkbox"/> 0 = No <input type="checkbox"/> 2 = Sort of <input type="checkbox"/> 4 = Yes, I have discussed this with a CPA		
D.E.2	Have you discussed with a qualified expert in farm and ranch taxation how your estate plan will affect the income taxes of the people who will receive your property or your estate?	<input type="checkbox"/> 0 = No <input type="checkbox"/> 2 = Sort of <input type="checkbox"/> 4 = Yes, I have discussed this with a CPA		
D.Z.1	How important is it to you to learn more about how to address estate tax issues as part of your estate plan?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		
D.Z.2	How important is it to you to learn more about how your estate plan will affect the income taxes of the people who will receive your property or your estate?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		

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E	LABOR AND CONTRACTORS Issue: Verify that there is a system in place to ensure payroll is timely paid.			
E.3.0	Do you pay any people on payroll with payroll taxes withheld and payroll tax returns filed?	<input type="checkbox"/> A = No and skip to section F <input type="checkbox"/> B = Yes and continue		
E.E.1	Does the person you expect will take over your operation if you are incapacitated or deceased have both the knowledge and the authority to ensure that payroll is timely processed in the event you are incapacitated or deceased? This means that they would know passwords for a payroll service and be able to authorize payment, or that they know how to run payroll if it is done in-house and that they have the ability to transfer funds as needed and to sign checks.	<input type="checkbox"/> 0 = The person who would take over my role if I were incapacitated or deceased has not been identified. <input type="checkbox"/> 1 = The person who would take over my role if I were incapacitated or deceased has been identified but they would not know anything about how to get a payroll run. <input type="checkbox"/> 2 = My bookkeeper or accountant will keep everything going but the person who would take over my role does not know about this part of the business. <input type="checkbox"/> 3 = The person who would take over my role if I were incapacitated or deceased has been identified, and they have received some training, and they have some knowledge of this function, but it would be good if they had more training or knowledge in this area. <input type="checkbox"/> 4 = I am 100% confident that the person who would take over my role if I were incapacitated or deceased has the training and knowledge they need to function in this role if required.		
E.Z.1	How important is it to you to learn more about how to ensure that your operation will remain in compliance with applicable labor laws during your temporary or permanent absence?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		

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F	PRODUCTION AND MARKETING To assess if there is a plan to ensure continuity of production and marketing		
F.4.0	Is there a plan for the immediate care of livestock if you are incapacitated?	<input type="checkbox"/> 0 = No. <input type="checkbox"/> 2 = Employees or family members know what to do - but we have not talked about it <input type="checkbox"/> 3 = Yes, we have backup systems for livestock care built into how we operate.	
F.E.0	Do you receive USDA program payments for any of your crops or farm products?	<input type="checkbox"/> 0 = No and skip to F.E.3 <input type="checkbox"/> 2 = Yes and continue	
F.E.1	If you are temporarily or permanently unable to continue in your role is there someone who has the knowledge and authority to continue to receive your USDA program payments?	<input type="checkbox"/> 0 = The person who would take over my role if I were incapacitated or deceased has not been identified. <input type="checkbox"/> 1 = The person who would take over my role if I were incapacitated or deceased has been identified but they do not have the knowledge or legal authority to act on my behalf to manage USDA program payment reporting requirements. <input type="checkbox"/> 2 = Employees or family members know what to do to remain in compliance, but would not have the immediate legal authority to act on my behalf if I were temporarily or permanently unable to act on my own behalf. <input type="checkbox"/> 3 = The person who would take over my role if I were incapacitated or deceased has been identified, and they understand how the USDA program payments work and have the legal authority to act to remain in compliance if I am unable to act on my own behalf.	

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F.E.2	If you are temporarily or permanently unable to continue in your role is there someone who has the knowledge and authority to act to continue production operations?	<input type="checkbox"/> 0 = The person who would take over my role if I were incapacitated or deceased has not been identified. <input type="checkbox"/> 1 = The person who would take over my role if I were incapacitated or deceased has been identified but they do not have the knowledge or legal authority to act on my behalf to continue production operations. <input type="checkbox"/> 2 = Employees or family members know what to do to continue production operations but would not have the immediate legal authority to act on my behalf if I were temporarily or permanently unable to act on my own behalf. <input type="checkbox"/> 3 = The person who would take over my role if I were incapacitated or deceased has been identified, and they have the knowledge and legal authority to ensure that production operations would continue in my absence.		
F.E.2	If you are temporarily or permanently unable to continue in your role is there someone who has the knowledge and authority to act to continue marketing operations?	<input type="checkbox"/> 0 = The person who would take over my role if I were incapacitated or deceased has not been identified. <input type="checkbox"/> 1 = The person who would take over my role if I were incapacitated or deceased has been identified but they do not have the knowledge or legal authority to act on my behalf to continue marketing operations. <input type="checkbox"/> 2 = Employees or family members know what to do to continue marketing operations but would not have the immediate legal authority to act on my behalf if I were temporarily or permanently unable to act on my own behalf. <input type="checkbox"/> 3 = The person who would take over my role if I were incapacitated or deceased has been identified, and they have the knowledge and legal authority to ensure that marketing operations would continue in my absence.		

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F.Z.1	How important is it to you to learn more about how to ensure that your production and marketing operations will be able to continue without interruption during your temporary or permanent absence?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		
G	CREDIT To assess if the operation will be able to manage cash needs during the temporary or long term absence of the primary operator.			
G.1.2	Is cash flow something you need to manage for? This means are there some months when you owe more than you can pay, but you are owed money that has not come in yet, or you are about to sell a crop that is not quite ready and there are times when cash is tight and you need to borrow or defer payments.	<input type="checkbox"/> 0 = No and skip to G.2.p <input type="checkbox"/> 2 = Yes and continue		

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G1.3	Does the person you expect will take over your operation if you are incapacitated or deceased have both the knowledge and the authority manage the cash flow needs of your business? This means they know how to predict and plan for cash needs and if an operating loan is part of your operations they have the knowledge and legal authority to draw funds, make loan payments, negotiate extensions and renewals etc.	<input type="checkbox"/> 0 = The person who would take over my role if I were incapacitated or deceased has not been identified. <input type="checkbox"/> 1 = The person who would take over my role if I were incapacitated or deceased has been identified but they would not know anything about how to manage cash flow or an operating loan. <input type="checkbox"/> 2 = There is a person on staff who knows how to do this but they would not have the legal authority to make a draw on the operating loan or to interact with lenders. <input type="checkbox"/> 3 = The person who would take over my role if I were incapacitated or deceased has been identified, and they have received some training, and they have some knowledge of this function, but they would not have immediate legal authority to make a draw or otherwise interact with lenders on behalf of the business. <input type="checkbox"/> 4 = I am 100% confident that the person who would take over my role if I were incapacitated or deceased has the training, knowledge and legal authority they need to function in this role if required.		
G.Z.1	How important is it to you to learn more about how to predict and manage cash flow?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		
G.Z.2	How important is it to you to learn more about how to ensure that your operation will have adequate cash on hand to ensure continuity of operations during your temporary or permanent absence?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		

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H	BUSINESS PLAN, INSURANCE, ENERGY, AND OTHER			
H.1.0	Is there a written business plan for your farm or ranch?	<input type="checkbox"/> 1 = No, I do not think my business needs one <input type="checkbox"/> 2 = They person or people who will take over the business may need to develop a written business plan when I am gone, but I do not know if they will know how to do that. <input type="checkbox"/> 3 = The person or people who will take over some or all of my business are working on their own business plan <input type="checkbox"/> 4 = I am working with the person or people who will take over some or all of my business to help them develop a business plan, or we have already accomplished this.		
H.2.0	Will the person or people who will take over your business have access to a network of friends, family, or neighbors who will help them as informal business advisors?	<input type="checkbox"/> 0 = No <input type="checkbox"/> 2 = Yes		

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H.6.0	Does the person you expect will take over your operation if you are incapacitated or deceased have both the knowledge and the authority manage the ongoing insurance relationships of your business? This includes general liability insurance and specialized crop and property insurance. They would need knowledge of insurance generally, knowledge or your policies specifically, access to the policies, and legal authority to act on your behalf to file a claim or to renew a policy.	<input type="checkbox"/> 0 = The person who would take over my role if I were incapacitated or deceased has not been identified. <input type="checkbox"/> 1 = The person who would take over my role if I were incapacitated or deceased has been identified but they would not know anything about how to manage the insurance policies of the business. <input type="checkbox"/> 2 = There is a person on staff who knows how to do this but they would not have the legal authority to make an insurance claim. <input type="checkbox"/> 3 = The person who would take over my role if I were incapacitated or deceased has been identified, and they have received some training, and they have some knowledge of this function, but they would not have immediate legal authority to make an insurance claim or otherwise act on behalf of the business. <input type="checkbox"/> 4 = I am 100% confident that the person who would take over my role if I were incapacitated or deceased has the training, knowledge and legal authority they need to function in this role if required.		

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Select the number or letter of your best response from the "Answers" column. Enter a number in the "Number Score" column and a letter in the "Letter Score" column.			Numbered Scores	Letter Scores
H.12.0	Are there written operating procedures in your office to help the people in your office continue to run operations in the event you are temporarily or permanently incapacitated?	<input type="checkbox"/> 0 = No, I have not thought about this or I do not know what these things are <input type="checkbox"/> 1 = No, but I have thought about this and I would like more information to understand what to do <input type="checkbox"/> 2 = I have a will and an estate plan, but I do not have a short term plan for a temporary successor if I am incapacitated, or I have a short term plan for a temporary successor but I do not have a will and an estate plan <input type="checkbox"/> 3 = I have put some effort into creating a short term or a long term succession plan but I have not been able to do it all, I have questions, I do not know if I have done it right, I am stuck on some things, I need help <input type="checkbox"/> 4 = Yes, I have a will as well as a succession plan including a designated person who is trained and authorized to take over my affairs if I am incapacitated or deceased		
H.Z.0	How important is it to you to learn more about the role a business plan might play in a farm or ranch transition or succession plan?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		
H.Z.1	How important is it to you to learn more about how to ensure that the person taking over operations is able to manage any insurance needs in your absence?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		
H.Z.5	How important is it to you to learn more about how to make a plan for your business and family if you are temporarily or permanently disabled or you are deceased?	<input type="checkbox"/> A = Not important <input type="checkbox"/> B = Somewhat important <input type="checkbox"/> C = Important but not a priority <input type="checkbox"/> D = Important <input type="checkbox"/> E = Very important/high priority		
I	PERSONAL INFORMATION			
I.1.0	Name			
I.2.0	E-mail			

Farm or Ranch Succession and Transition Readiness Assessment
FOR CURRENT OWNERS/OPERATORS

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I.3.0	Phone			
I.4.0	Physical address			
I.5.0	Best time and way to get in touch?			
I.8.0	Do you have a computer? Laptop, desktop or tablet?	<input type="checkbox"/> 0 = No <input type="checkbox"/> 1 = Tablet <input type="checkbox"/> 2 = Desktop or laptop		
I.9.0	How do you get information about farming and farm business management?	<input type="checkbox"/> 0 = I don't know about this, I do not have a plan for this <input type="checkbox"/> 1 = Friends & family <input type="checkbox"/> 2 = Friends & family & neighbors/mentor farmers <input type="checkbox"/> 3 = Friends, family, neighbors & also from the internet, (blogs, podcasts, websites, articles) or only from the internet <input type="checkbox"/> 4 = Some or all of the prior sources and NRCS, FSA, Extension, membership organization, ongoing association with a training program or incubator, or other farm service providers <input type="checkbox"/> 5 = All of the prior plus books, magazines, classes		
I.9.1	Are you a dues-paying member of an association that provides you with information and advocacy about legal and regulatory issues?	<input type="checkbox"/> 0 = No and go to 1.10.0 <input type="checkbox"/> 1 = Yes		
I.9.2	Which one?	<input type="checkbox"/> A = Farm Bureau <input type="checkbox"/> B = Farmers Union <input type="checkbox"/> C = Grange <input type="checkbox"/> D = National Young Farmers <input type="checkbox"/> E = Other		
I.10.0	How likely are you to go to classes to learn more?	<input type="checkbox"/> 0 = I won't <input type="checkbox"/> 1 = Maybe if it is free and convenient <input type="checkbox"/> 2 = Maybe if it is cheap and convenient <input type="checkbox"/> 3 = Likely if I could afford it and find the time <input type="checkbox"/> 4 = Very likely, or I already do that or have done that		

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I.11.0	How much would you value one on one technical assistance with topics we have discussed?	<input type="checkbox"/> 0 = Not much <input type="checkbox"/> 1 = A bit, depends, not sure <input type="checkbox"/> 2 = I would be interested in learning more <input type="checkbox"/> 3 = I would probably want this <input type="checkbox"/> 4 = I defiantly want this!		
J	OPTIONAL DEMOGRAPHIC DATA - UNSCORED BUT REPORTED TO FUNDERS			
J.1.0	M/F/N	<input type="checkbox"/> A = Female <input type="checkbox"/> B = Male <input type="checkbox"/> C = Non-binary		
J.2.0	Race(s)	Please enter in "Letter Score" box		
J.3.0	Year of birth	Please enter in "Letter Score" box		
J.4.0	Disability?	<input type="checkbox"/> A = Yes <input type="checkbox"/> B = No		
J.5.0	Do you have military experience?	<input type="checkbox"/> A= Yes <input type="checkbox"/> B=No		
J.5.1	Branch?	Please enter in "Letter Score" box		
J.5.2	Rank?	Please enter in "Letter Score" box		
J.5.3	Current status?	<input type="checkbox"/> A = Active <input type="checkbox"/> B = Discharged <input type="checkbox"/> C = Retired		
J.5.4	Educational benefits?	<input type="checkbox"/> A= Yes <input type="checkbox"/> B=No		
J.5.5	Disability benefits?	<input type="checkbox"/> A= Yes <input type="checkbox"/> B=No		