



Make the most of our first meeting

Land As Your Legacy® transition planning checklist

To determine the best plan for your farm or ranch, we need to review your current financial situation. Please bring the minimum required information to our first meeting.

Minimum required information to start the discussion:

- Current balance sheet (business and personal)
- Tax returns (last two years)
- Planning documents (wills, trust, etc.)

Get even more out of your first Land As Your Legacy meeting by bringing the following information:

Brokerage Statements

- Bank statements
- Pension statements
- Social Security benefit estimate

Debt

- Equipment/machinery debt
- Notes payable to you
- Operations line of credit
- Real estate debt

Employer Benefits

- Company sponsored group benefits (health, life and disability)
- Company sponsored qualified retirement plan

Insurance policies

- Auto and homeowners insurance
- Farm insurance
- Life insurance
- Long-term care (LTC) policies
- Umbrella policies

Land and real estate

- Deeds or land contracts
- Mortgages
- Oil, gas and mineral interest

Legal – Corporate or commercial

- Articles of incorporation and bylaws
- Buy/sell agreements
- Operating agreements

Legal – Individual

- Durable powers of attorney
- Health care powers of attorney
- Wills and trust

Please include any additional information that would provide a comprehensive view of your operation and where you stand in terms of transition planning. We look forward to working with you on your farm or ranch transition plan.

• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution • Not insured by any federal government agency • May lose value

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