



Legacy by Design, LLC

Sample Estate Flow Chart

WORKSHEET

Succession Planning

Farmers, Ranchers, & Family Business Owners

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Flow Chart for the [] Family



LEGACY BY DESIGN, LLC
Succession Planning for Agribusiness Owners

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Estimated Estate Value: \$?? mm (12% growth rate '17 to '18).
Objectives:

- Reduce exposure to the estate tax (currently \$11 mm @ 40%)
- Protect assets from creditors, predators, divorce, etc.
- Ensure operational assets transition to active family only

