



Selecting an Adviser

Here's a brief interview guide to help you identify an adviser who can facilitate your family's succession planning process.

1. What is your experience facilitating the succession planning process?

2. What qualifies you as a specialist in succession planning?

3. How long have you been providing succession planning advice?

4. For how many families have you provided a succession planning service?

5. Do you understand the specific succession planning needs and concerns of farmers and agribusiness owners?

6. Do you utilize defined planning models and a specific planning process?

7. Can you assemble a multidisciplinary team of professionals and ensure that the family's planning objectives are met?

8. What other services do you offer?

9. How do you get paid for services?

10. How do you assure satisfaction?
