

Who and What List

Start by writing down a list of your family members and what you've given them already, including education, vehicles, mortgages, down payments, non-farm business opportunities, etc. Include proper names and contact information. Remember to store this list securely.

Example:

Full Name	Nickname	Place of Residence	Relationship	Role on Farm
Jane Smith	Jay	off-farm (Fergus)	Daughter	N/A
Previous Gifts	Undergraduate Education, down payment assistance			
Inheritance Expectation				

Full Name	Nickname	Place of Residence	Relationship	Role on Farm
Previous Gifts				
Inheritance Expectation				

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Previous Gifts				
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