



Ag Legacy

# More Than Dirt: Passing On the Ranch and the Relationships

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Welcome to another AG LEGACY recording.

AG LEGACY is a series of presentations and other online materials intended to assist rural families in creating their own legacy by beginning the thought process and opening the lines of communication.

Today's recording will address the topic More Than Dirt: Passing On the Ranch and the Relationships

Today's speaker

**John Hewlett**

Ranch/Farm Management Extension Specialist  
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I'm John Hewlett Ranch/Farm Management Extension Specialist  
in the University of Wyoming Department of Agricultural & Applied Economics

I will be your speaker for today's AG LEGACY presentation

# More Than Dirt : Passing On the Ranch and the Relationships

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Thank you for joining this discussion on the Passing On the Ranch and the Relationships

Have you ever wondered how to preserve the ranch and your relationships with family members for the future? You're not alone—many families struggle with this.

Today, we'll explore Passing On the Ranch and the Relationships



# More Than Dirt: Passing On the Ranch and the Relationships

A blueprint for managing farm succession and family dynamics.

When families think about transition planning, the conversation usually centers on land values, taxes, legal documents, and ownership structures. Those issues matter, but they are only part of the picture. In most farm and ranch transitions, the real challenge is not just how property moves from one generation to the next. The real challenge is how to make that transition in a way that protects both the operation and the family relationships behind it.

Today, the focus is on practical ways to approach that human side of succession. The goal is to help families think clearly, communicate better, and build a plan that supports both continuity of the business and stability within the family.

***"It wasn't about money.  
It was about relationships."***

One tough conversation can surface a lifetime of history.

- Three kids, two parents, three generations.
- The question of "who gets what" sparked childhood arguments.
- Everyone meant well, but no one knew how to start the conversation.

For many families, transition planning becomes difficult the moment the question of who gets what is raised.

A family may have worked side by side for years with no major conflict. But once the conversation turns to stepping back, transferring ownership, or dividing property, old tensions can resurface very quickly. What looks like a disagreement over land, cattle, or machinery is often really a disagreement rooted in history, expectations, and relationships.

That is why this topic is more than a financial issue. It is not just about assets. It is about trust, communication, and whether a family can move through a hard transition without doing lasting damage to the relationships that hold the operation together.

It is not just the big things that cause big fights.

### Titled Property

#### Legal Papers



Ownership with legal paperwork.  
High financial value.

### Non-Titled Property

#### Heart & History



Items carrying deep emotional history.  
Often spark the most unexpected tension.

One of the first things families need to recognize is that conflict does not come only from the biggest assets.

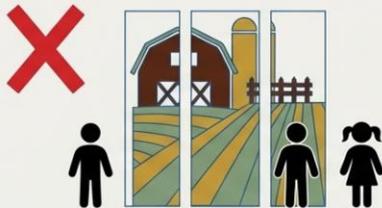
Titled property includes items with formal legal ownership, such as land, equipment, vehicles, buildings, and financial accounts. These are the things people usually think about first because they have obvious financial value and formal paperwork attached to them.

But non-titled property can create just as much tension, and sometimes even more. These are the items that carry heart and history: old tools, saddles, quilts, rings, keepsakes, and family heirlooms. On paper they may not be worth much, but emotionally they can mean everything.

If a family plans only for the land and ignores the items tied to memory and identity, they may leave behind exactly the kind of uncertainty that causes hurt feelings and family conflict.

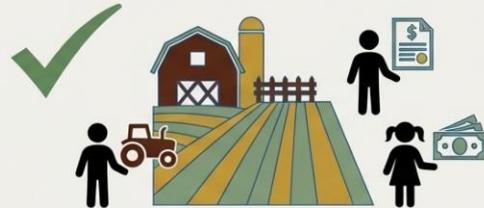
# Fair does not always mean equal.

## Equality - Fairness through Uniformity



Everyone gets the exact same slice.  
**Result:** The farm cannot survive.

## Equity - Fairness through Individual Needs



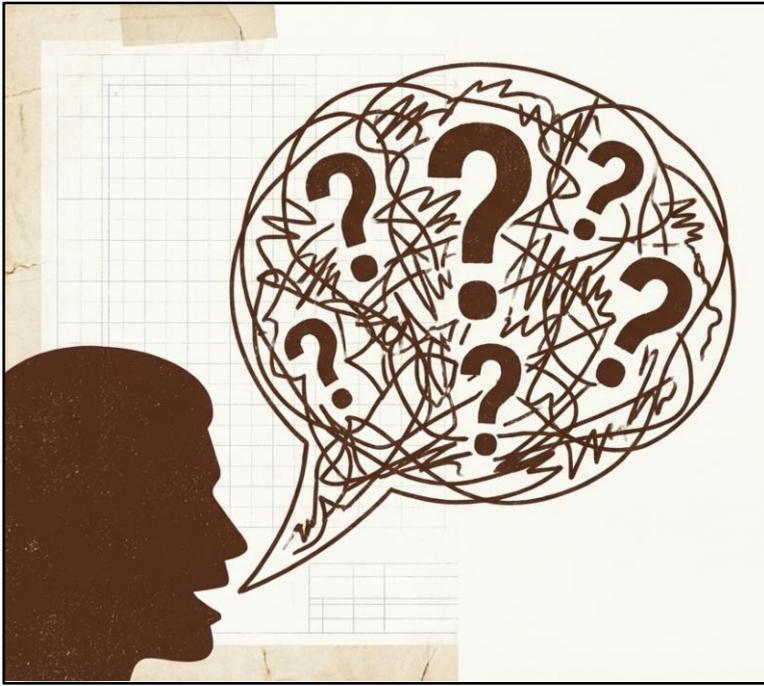
Everyone receives value that makes sense for their situation.  
**Result:** The farm stays intact and relationships are respected.

This brings us to one of the hardest ideas in succession planning: fairness.

Many parents naturally assume that fairness means equal division. That sounds simple, and emotionally it can feel like the safest approach. But in agriculture, equal is not always fair, and it is often not workable.

If every child receives the exact same share of a working farm or ranch, the result may be that the operation can no longer function as a business. A fragmented operation often cannot support anyone well.

A more durable approach is equity. Equity means decisions are made according to the needs of the operation and the circumstances of the people involved. One child may receive the land and machinery to keep the ranch intact, while others receive value through insurance, cash, other assets, or different arrangements. The point is not sameness. The point is a plan that makes sense, preserves the business, and respects the family.



**Vague plans are worse than no plans at all.**

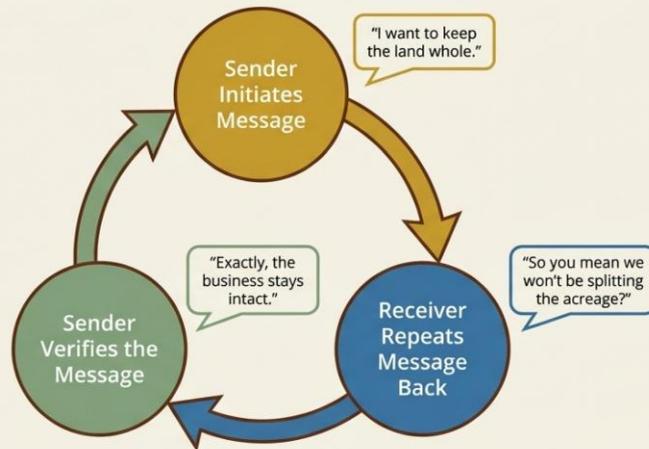
- Assumptions fill the silence.
- People imagine promises that were never made.
- Clarity reduces hurt feelings.

A major source of family conflict is not always a bad plan. Often, it is no clear plan at all.

When parents are vague about their intentions, silence gets filled by assumptions. Family members begin to guess what was meant, what was promised, or what will happen later. Those guesses often turn into expectations, and expectations that are not grounded in clear communication can turn into resentment very quickly.

Clarity matters because it reduces confusion and hurt feelings. Even when the message is hard to hear, a clear plan is usually better than uncertainty. Families are much more likely to move forward productively when they know where things stand.

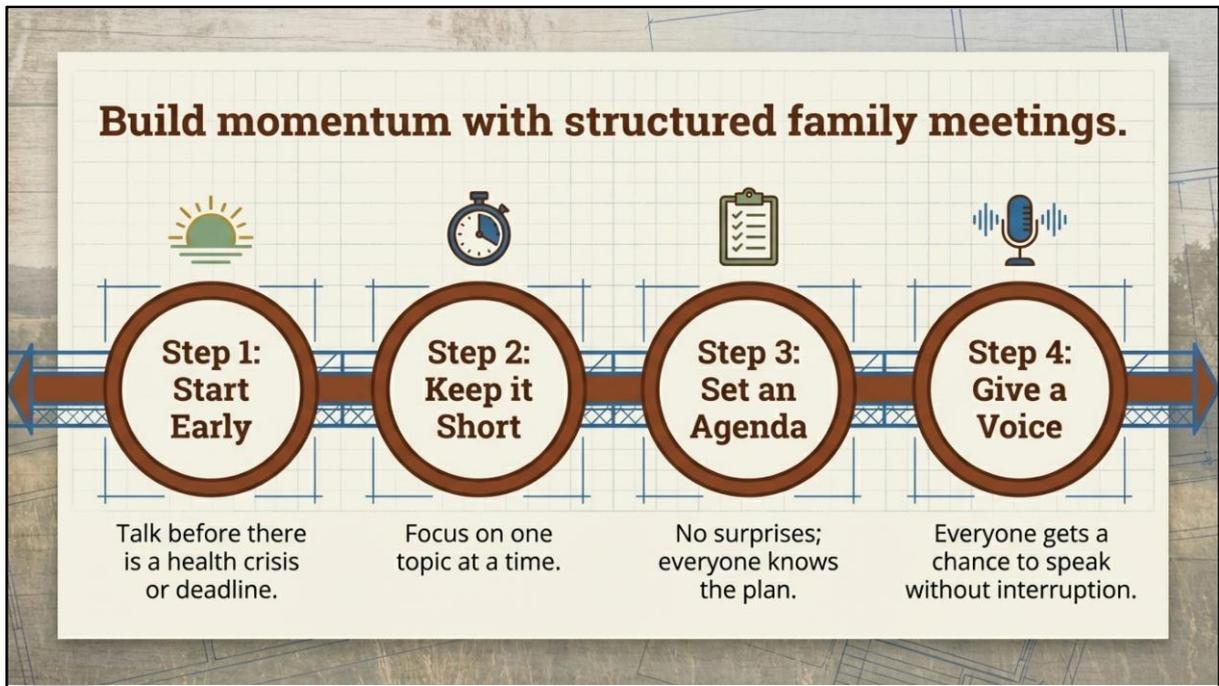
## How to ensure your family truly hears your intentions.



Of course, good communication is not just saying something once and hoping everyone understood it.

One useful method is closed-loop communication. It is simple, but very effective. First, one person states the message clearly. Second, the listener repeats back what they heard in their own words. Third, the speaker confirms or corrects that understanding.

This process slows the conversation down in a good way. It helps catch misunderstandings before they become major disagreements. In family transition discussions, that can be extremely valuable, because assumptions often do more damage than direct disagreement.

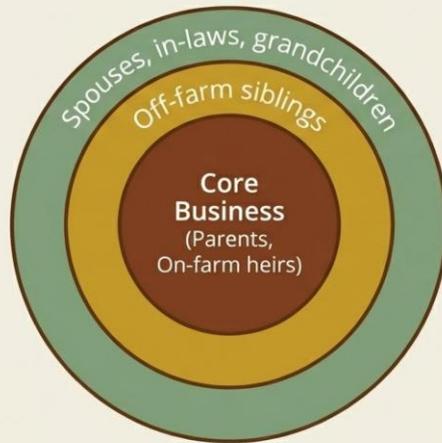


Good communication also needs a good setting. That is why structured family meetings can be so helpful.

The first principle is to start early, before there is a health crisis, financial emergency, or deadline. The second is to keep meetings short and manageable, with one topic at a time. The third is to set an agenda so no one feels blindsided. And the fourth is to make sure everyone has a chance to speak.

These meetings do not have to solve everything at once. In fact, they should not. Their purpose is to build momentum, reduce surprises, and help the family work through a difficult topic step by step.

## **Giving a voice does not mean giving a vote.**



**Involving people  
builds respect.  
Being left out  
breeds conflict.**



At this point, some families worry that including more people will create more problems. But inclusion does not mean surrendering decision-making authority.

Giving people a voice does not mean everyone gets a vote on every business decision. In most farm and ranch situations, there is still a core group whose daily livelihood is directly tied to the operation. Those people may carry primary decision-making responsibility.

But others, including off-farm siblings, spouses, in-laws, and even grandchildren, can still be deeply affected by what happens. Including them in the conversation builds respect and reduces the sense that decisions were made behind closed doors. When people understand the reasoning, they are often far more willing to accept the outcome, even if they would have preferred something different.

# Choosing the right tool for the job.



A sound succession plan also requires the right tools.

Some tools are formal legal tools. These include wills, trusts, and beneficiary designations. They are essential because they govern how property is legally transferred.

Other tools are informal communication tools, such as personal property memoranda and letters of instruction. These tools do not replace legal documents, but they add clarity, explanation, and personal meaning.

A complete plan usually needs both. Legal tools transfer ownership. Communication tools transfer intentions, values, and understanding.

## The Formal Blueprint: Legally Binding Tools

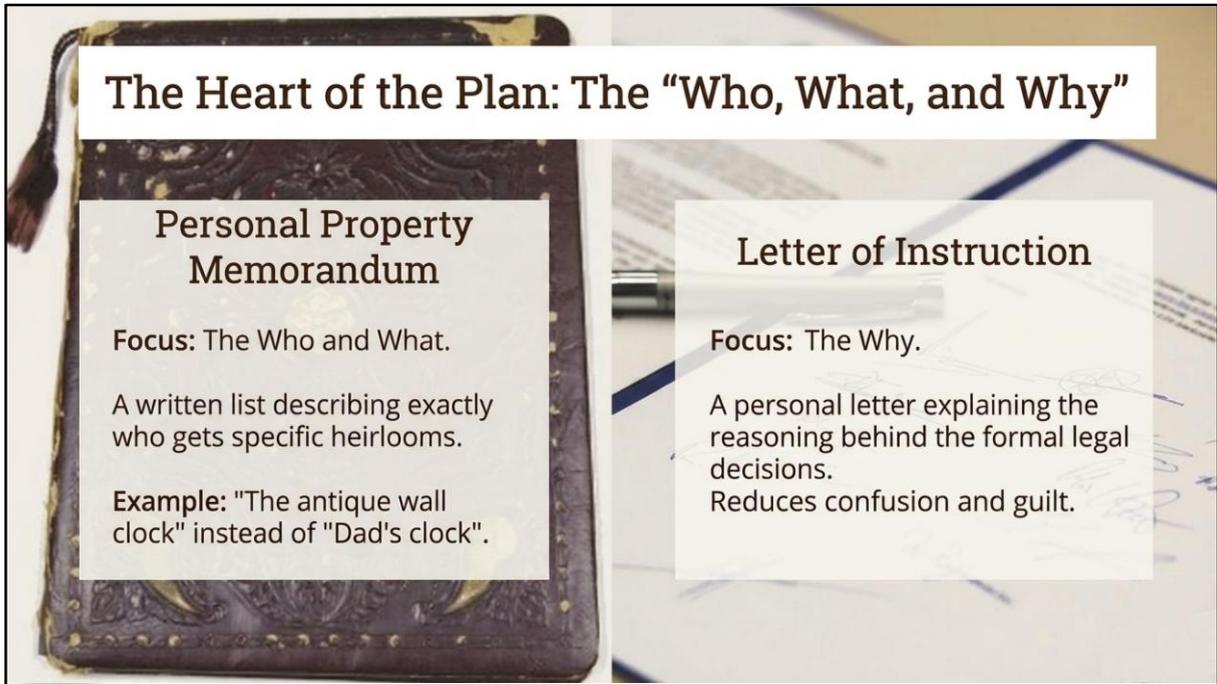
Tool	When it takes effect	Avoids Probate?	Best used for...
Will	After death	No	Naming an executor, basic property distribution.
Trust	Immediately or later	Yes	Privacy, avoiding probate, controlling when assets are given.
Beneficiary Designation	After death	Yes	Bank accounts, life insurance (trumps a will).

Looking more closely at the formal tools, each one has a distinct role.

A will is the most familiar tool. It takes effect after death and can name an executor and direct basic property distribution. But it generally does not avoid probate.

A trust can offer more flexibility. It may take effect immediately or later, and it can help avoid probate while also giving more control over how and when assets are distributed.

Beneficiary designations apply to certain assets, such as life insurance, retirement accounts, and payable-on-death accounts. These designations are especially important because they generally operate outside the will. That means they need to be reviewed and updated carefully so they align with the broader plan.

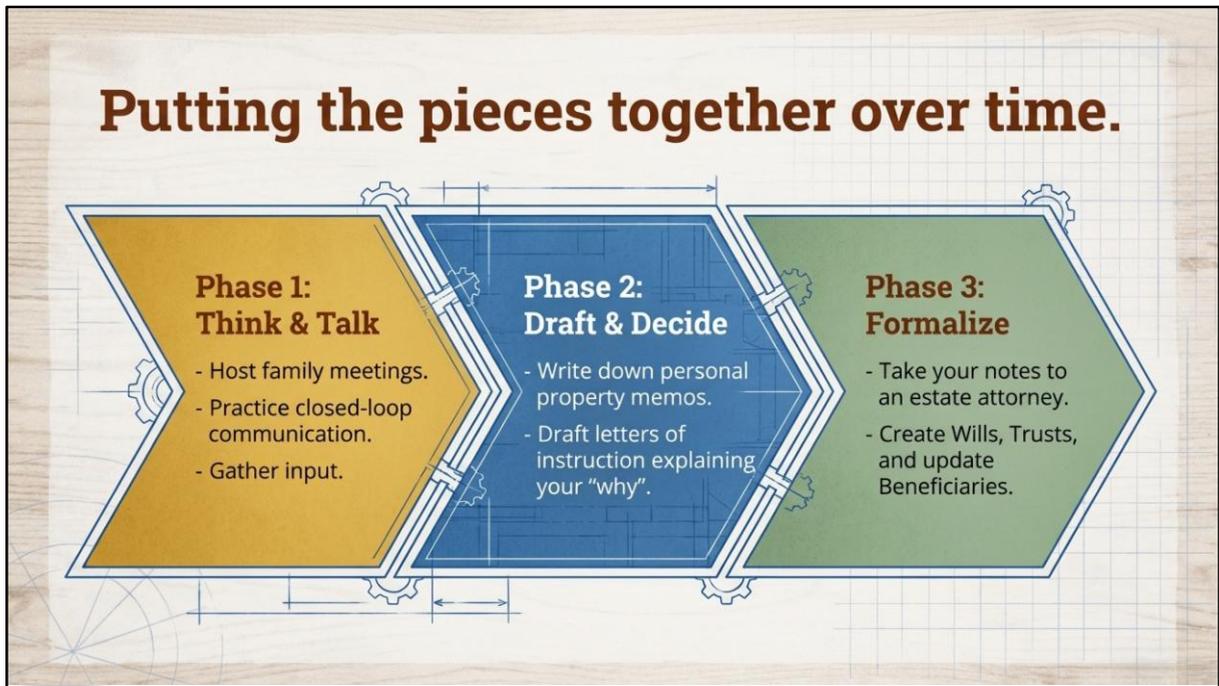


Formal documents are necessary, but they often do not answer the questions that matter most to family members.

A personal property memorandum helps answer the who and what. It is a written list that identifies who should receive specific heirlooms or personal items. The key is specificity. Clear descriptions reduce confusion and reduce the chance of later arguments.

A letter of instruction addresses the why. It gives families a chance to explain the reasoning behind their decisions in their own words. It is not just a legal matter. It is a relational tool. It can help surviving family members understand the intent behind the plan and can soften the emotional impact of hard choices.

## Putting the pieces together over time.



The good news is that families do not have to do all of this at once.

A phased process often works best. First comes think and talk. That means holding family discussions, practicing better communication, and gathering input. Next comes draft and decide. That is where families begin writing down specific wishes, especially for personal property, and explaining their reasoning. Finally comes formalize. That is when they take those ideas to qualified professionals and turn them into legal documents that fit together properly.

This step-by-step approach makes the process more manageable and often leads to better decisions.

## The cost of waiting is too high.



### Start Small.

Pick one specific topic for your first family meeting.



### Write it Down.

Do not rely on memory. Start your personal property list today.



### Get Professional Advice.

Your family is unique; off-the-shelf plans do not work for farms.

If there is one major warning in this discussion, it is this: waiting too long creates risk.

The cost of delay can be very high. Families lose the opportunity to ask questions, clarify intentions, and make thoughtful decisions while everyone is still able to participate well.

That is why the advice here is straightforward. Start small. Pick one issue and begin. Write things down instead of relying on memory. And get professional advice, because every family and every operation is different. Plans that work for one family may not fit another at all.

## Your legacy is more than dirt.



### **Relationships First.**

Protect the family to protect the farm.



### **Equity over Equality.**

Fair means decisions make sense, not that everyone gets the exact same thing.



### **Talk Early.**

Silence breeds assumptions. Include all stakeholders.



### **Write It Down.**

Use both formal legal tools and personal letters to make your wishes known.

As we come to the end, there are four central takeaways.

First, relationships come first. Protecting the family helps protect the farm.

Second, equity matters more than simple equality. Fairness means decisions make sense for the people involved and for the future of the operation.

Third, talk early. Silence invites assumptions, and assumptions create conflict.

Fourth, write it down. Use both formal legal tools and personal written communication so your wishes are clear.

At the end of the day, a legacy is not just land, machinery, or wealth. A legacy also includes whether the next generation inherits clarity, trust, and peace.

## Resources for Your Legacy Journey

Visit [AgLegacy.org](http://AgLegacy.org) for online modules, recorded presentations, and management succession plans.

Email: [Information@AgLegacy.org](mailto:Information@AgLegacy.org)



No family has to navigate this process alone. There are resources available through Ag Legacy, including online modules, recorded presentations, newsletters, and other materials designed to help families begin these conversations and move toward workable plans.

The most important step is simply to begin. A thoughtful plan developed over time can make an enormous difference, not only in how property is passed on, but in whether the family remains strong through the transition.



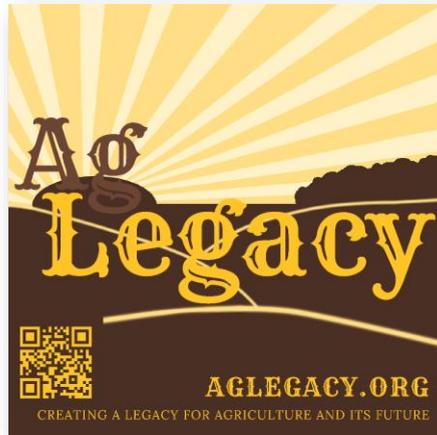
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If you have found this presentation helpful, we also recommend that you check out the newsletter on the same topic. You can find it on our website at [AGLEGACY.org](http://AGLEGACY.org).

And while you are there, be sure to check out our other materials including modules, newsletters, and additional materials to help you in creating your own Ag Legacy.

THANK YOU!



Thank you for tuning in!