

## Case study

# Succession planning for farmers and crofters

Support provided by FAS: Specialist advice succession planning



### Name & business: **Heather Wildman, Saviour Associates**

Heather Wildman grew up on a hill farm in the Lake District. Since leaving school at 15 Heather's career has evolved across varying agricultural roles, predominantly in the dairy sector. Using her entrepreneurial skills Heather established her own business in 2014, Saviour Associates Ltd. Specialising in staff management, motivation, leadership, resilience and succession the business now works across all types of enterprises.

Here, Heather shares her thoughts on being an expert adviser delivering specialist advice on succession planning.

### **Why do you think succession planning is important?**

I encourage more families to get their succession plan in order in case of fall out, financial pressure or a health crisis. Regardless of circumstance, most people find it hard to have conversations about succession. My approach aids this and provides farmers/crofters with confidence knowing their business is in safe hands in the future.

**“Soft skills with a sledge hammer!”**

### **How can you help?**

I am motivated and a straight talker, who is not afraid of tackling difficult and sensitive issues and situations whilst ensuring that trust, values and confidentiality are respected.

### **Do you get anything out of delivering advice, professionally or personally?**

I am passionate about helping people, my aim is to make a positive difference to every client or company that I work with.

I help farmers/crofters identify who they are, where they want to be and to discuss and agree how we are going to help them get there.

I am a connector, a motivator, an agent of positive change.

### **What can farmers/crofters expect from FAS?**

Heather and other advisers:

**“Help to identify and develop goals and visions leading onto strategic planning.”**



All advisers ensure they are continuously on top of their game and always developing in this ever challenging volatile environment.

You can view FAS's succession planning info packs [here](#), which includes a previous [webinar](#) delivered by Heather.

## **Why and who can apply?**

Specialist advice is open to all farming and crofting businesses, provided that they are registered in Scotland Rural Payments and Services and hold a Business Reference Number (BRN) with IACS.

## **Words from a farmer**

Kenneth Bone runs cattle and sheep on a large farm on the Isle of Arran. He benefited from Heather's advice on succession planning in 2021.

### **Why did you solicit the services of FAS on succession planning?**

I wanted to start the family succession conversation and to collaboratively come up with a plan where everyone benefits fairly. I wanted a clear vision for the farming business to be transitioned from one generation to the next while for my wife and I to be able to have a better work-life balance.

### **How was your meeting with Heather?**

We met with Heather in a neutral location in Ayr rather than our own farmhouse as I did not wish any distractions and everyone put focus on the meeting. We developed an action plan and set a president for future family communication on how we achieve our end goals.

### **How did Heather support you in this succession planning process?**

Heather was a great catalyst for commencing and directing us all through what could have been a difficult conversation. She had a light hearted approach to what were serious considerations which put everyone at ease.

### **Did you implement any action as a result of the specialist advice you received?**

Heather gave us some essential steps and points to consider when implementing the succession plan, that we have since put into motion.

Since our meeting with Heather, I created a 'how to' manual which lists all the essential contacts, insurance/life policies, solicitors, consultants, etc to assist everyone in the future. I also took full legal and professional/tax advice, and I have recruited another member of staff on a part time basis.

### **Would you recommend Heather's services to other farmers?**

Yes, absolutely. I noticed that Heather won the best advisor category award at last year's Scottish Farm awards ceremony, and it was truly well deserved.

**For further information about the support available, please visit [www.fas.scot](http://www.fas.scot)**

**Or contact us  
T: 0300 323 0161  
E: [advice@fas.scot](mailto:advice@fas.scot)**

