

FIRST FARM & RANCH OPPORTUNITY WORKFLOW

A Quick-Reference Handout for Residential Agents in Texas

Core message: Farm and ranch is not just residential with more acreage.

Safety Standard: For the first three farm and ranch transactions, the agent should be guided, supervised, mentored, partnered, or referred. Do not make the client your farm and ranch experiment.

15-Step First Opportunity Workflow

1. Pause before promising anything

Do not guess, promise, or wing it. Say: "This may involve farm and ranch issues, so let me gather the right information and make sure we handle it correctly."

2. Identify the property type

Determine whether it is small acreage, vacant land, hunting property, horse property, working ranch, farm, recreational tract, inherited land, custom homesite, or development land.

3. Notify your broker early

Share acreage, property type, intended use, known issues, your experience level, and whether you need guidance from a broker, mentor, land specialist, attorney, lender, or other professional.

4. Assess competency

Decide whether you can lead with guidance, should partner with an experienced farm and ranch agent, need direct supervision, or should refer the opportunity.

5. Clarify the client's goal

For buyers, intended use drives due diligence. Ask about living there, horses, cattle, hunting, recreation, farming, investment, building, financing, water needs, fencing, minerals, and ag valuation. For sellers, ask about acreage, survey, access, wells, septic, minerals, leases, equipment, valuation, and known issues.

6. Gather important documents

Request the survey, legal description, title information, well records, septic records, tax records, valuation records, easement documents, leases, restrictions, utility information, mineral information, floodplain information, and equipment or personal property lists.

7. Verify access and boundaries

Confirm public road frontage, private road access, recorded easements, road maintenance obligations, survey status, fence location, encroachments, and any neighbor use. Fences are not surveys.

8. Investigate water, septic, and utilities

Check private wells, shared wells, co-op water, meters, well inspections, water quality, well production, septic systems, septic permits, electricity, propane, internet, ponds, tanks, creeks, and springs.

9. Review ag or wildlife valuation

Verify whether the property has agricultural or wildlife valuation, what use qualified it, what must be done to maintain it, whether the buyer's intended use works, and whether rollback taxes could be triggered.

10. Identify minerals, leases, and surface-use issues

Ask whether minerals are owned, conveyed, or reserved. Identify oil and gas leases, pipelines, pads, grazing leases, hunting leases, crop leases, wind or solar agreements, cell tower agreements, and whether any agreement survives closing.

11. Use the correct contract

TREC has a Farm and Ranch Contract for many rural transactions. Get broker guidance before selecting forms, completing forms, or trying to explain complex clauses.

12. Manage due diligence closely

Track survey, title, easements, access, well, septic, minerals, leases, ag valuation, rollback tax, floodplain, soil, drainage, environmental, road maintenance, utilities, insurance, and financing.

13. Clarify possession and what conveys

Address possession, livestock, crops, hunting rights, grazing arrangements, tenants, equipment, blinds, feeders, troughs, gates, panels, tanks, portable buildings, keys, codes, and access devices in writing.

14. Document everything

Document broker guidance, mentor involvement, client instructions, recommendations to seek expert advice, deadline reminders, warnings, referrals, and client decisions.

15. Debrief after the deal

Review what went well, what surprised you, what you missed, and what should be improved next time. Save a checklist and keep building your resource list.

Broker Conversation Starter

- Here is the property type and approximate acreage.
- Here is the buyer's or seller's intended goal.
- Here are the farm and ranch issues I already see.
- Here are the issues I do not fully understand yet.
- Here is who I believe should be involved to protect the client.

Red-Flag Triggers: Get Experienced Help Immediately

- Large acreage or working ranch operations
- Mineral rights, mineral reservations, oil and gas activity, pipelines, pads, or surface-use concerns
- Hunting, grazing, crop, wind, solar, cell tower, or other leases
- Unclear legal access, private roads, shared gates, or road maintenance questions
- Wells, shared wells, water quality, water quantity, septic, or rural utilities you do not understand
- Agricultural or wildlife valuation, especially if rollback taxes may be an issue
- Boundary disputes, fence questions, encroachments, or an old or missing survey
- Livestock, equipment, crops, deer blinds, feeders, panels, tanks, or personal property expectations

Simple Agent Script

"Because this involves farm and ranch issues, I want to make sure we protect you properly. I am going to involve my broker and, where appropriate, experienced farm and ranch guidance and the right professionals so we handle this correctly."

Final Reminder

Your license may allow you to participate, but competency determines whether you should lead. When in doubt, slow down, ask better questions, involve your broker, and get experienced guidance before moving forward.