Beginning Farmer Annual Financial Review

An annual financial review template for beginning farmers. It organizes the year's results, lessons, and goals so a farmer can look back and plan ahead.

Farm / unit: _____ Date: _____ By: _____

Year in summary

Total income by source

Total expenses by category

Net result

Debts and loan status

Savings and reserves

Lessons learned

Goals for next year

Advisor feedback

TIP Complete the review soon after year end while memories and records are fresh.