Beginning Farmer Record Retention Guide

A guide to record retention for beginning farmers. It lists the records to keep, how to store them, and why to ask a tax professional how long to hold each kind.

Farm / unit: _____ Date: _____ By: _____

1. List the record types you hold
2. Sort tax and income records
3. Sort loan and lease records
4. Sort equipment and land records
5. Sort employee records
6. Choose storage method
7. Back up digital files
8. Ask how long to keep each type
9. Dispose of old records safely

YOUR NOTES

TIP Ask your tax professional or the IRS how long each record should be kept.

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