Beginning Farmer Tax Preparation Checklist

A checklist for beginning farmers preparing for tax filing. It lists records to gather and questions to bring to a tax professional. Fill it out in pencil so it is easy to update.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
Income records by source	☐	☐	☐
Expense receipts sorted	☐	☐	☐
Bank statements	☐	☐	☐
Equipment purchase records	☐	☐	☐
Land and lease records	☐	☐	☐
Payroll records	☐	☐	☐
Prior year return	☐	☐	☐
Questions for tax preparer	☐	☐	☐
Filing and payment dates noted	☐	☐	☐

NOTES / REPAIRS NEEDED

TIP Work with a licensed tax professional or the IRS to confirm what applies to your farm.

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