Beginning Farmer Year-End Checklist

A year-end checklist for beginning farmers. It helps wrap up records, taxes, inventory, and planning so the new year starts on solid ground. Use it alongside advice from local advisors.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
Reconcile all bank accounts	☐	☐	☐
Record final sales	☐	☐	☐
Collect missing receipts	☐	☐	☐
Count inventory	☐	☐	☐
Review equipment records	☐	☐	☐
Review loan balances	☐	☐	☐
Gather tax records	☐	☐	☐
Meet tax professional	☐	☐	☐
Set next year goals	☐	☐	☐

NOTES / REPAIRS NEEDED

TIP Schedule your tax professional meeting early and bring this list with your records.