Farm Annual Financial Summary Template

A section outline for a yearly financial summary of the farm, pulling together income, costs, assets and debts. Helps owners see the year clearly and plan the next one.

Farm / unit: _____ Date: _____ By: _____

Year covered and method used

Total income by enterprise

Total expenses by category

Net farm income

Assets at year end

Debts at year end

Changes from last year

Main lessons learned

Plans for next year

TIP Complete the summary soon after year end while memories are fresh, and file it with your tax records.