Farm Lender Meeting Preparation Checklist

A checklist for getting ready to meet your farm lender, so the visit covers numbers, plans and requests clearly. Helps owners make a good case and avoid return trips.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
Purpose of the meeting written down	☐	☐	☐
Current balance sheet	☐	☐	☐
Recent income statements	☐	☐	☐
Cash flow projection	☐	☐	☐
Production and marketing plan	☐	☐	☐
Loan amount and use stated	☐	☐	☐
Collateral and insurance details	☐	☐	☐
Questions for the lender	☐	☐	☐
Notes on past loan history	☐	☐	☐
Copies for each attendee	☐	☐	☐

NOTES / REPAIRS NEEDED

TIP Rehearse a short summary of your plan, and be ready to explain any weak spots in the numbers openly.