Farm Quarterly Financial Review Worksheet

A worksheet for a quarterly review of farm finances, comparing results with budget and noting changes to make. Helps owners stay ahead of problems. Fill it in by hand or on screen and file it when finished.

Farm / unit: _____ Date: _____ By: _____

Quarter being reviewed _____

Income for the quarter _____

Expenses for the quarter _____

Cash position and loan balances _____

Comparison to budget _____

Production and price changes _____

Problems found in the review _____

Actions to take _____

Date of next review _____

NOTES / CALCULATIONS

TIP Hold the review at the same time each quarter and share it with your lender or adviser if asked.