Farm Savings & Investment Plan Template

A section outline for a farm savings and investment plan, covering reserves, goals and where extra money should go. Helps owners plan beyond the next season.

Farm / unit: _____ Date: _____ By: _____

Savings goals and time frames

Emergency reserve target

Debt reduction priorities

Farm reinvestment options

Off-farm investment options

Retirement saving plan

Cash needs by season

Advisers to consult

Review dates and owners

TIP Talk with a licensed financial adviser before investing, and revisit the plan after each good or poor year.