Farm Tax Preparation Checklist

A checklist of papers and questions to gather before meeting your tax preparer about the farm return. Helps avoid missed deductions and last minute searches.

Farm / unit: _____ Date: _____ By: _____

ITEM	OK	FIX	N/A
Prior year return copy	☐	☐	☐
Income statements and sales records	☐	☐	☐
Receipts and expense records	☐	☐	☐
Government payment forms	☐	☐	☐
Loan interest statements	☐	☐	☐
Asset purchases and sales	☐	☐	☐
Inventory counts at year end	☐	☐	☐
Payroll records for hired help	☐	☐	☐
Vehicle and mileage records	☐	☐	☐
Questions to ask your preparer	☐	☐	☐

NOTES / REPAIRS NEEDED

TIP Start gathering early in the year and confirm filing dates and rules with the IRS or your tax professional.