Farm Financial Summary Template

A farm financial summary template for gathering income, expenses, assets and debts in one place, so owners can share a clear picture with a lender, partner or advisor.

Farm / unit: _____ Date: _____ By: _____

Reporting period

Income by source

Expenses by category

Assets owned

Debts owed

Cash on hand

Upcoming large expenses

Notes on unusual items

Prepared by

Reviewed by

TIP Have an accountant review the summary before it goes to a lender.