

## Farm & Agricultural Tax Preparation Expense Summary

**Tax Year:** \_\_\_\_\_

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### Client Information

**Farm Name (if applicable):** \_\_\_\_\_

**Owner Name:** \_\_\_\_\_

**Farm Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Business Structure:**

- Sole Proprietor
- Partnership
- LLC
- S Corporation
- C Corporation

**Employer Identification Number (EIN) (if applicable):** \_\_\_\_\_

**Primary Farming Activity:**

- Crop Production
  - Livestock / Dairy
  - Poultry
  - Aquaculture
  - Nursery / Greenhouse
  - Mixed Farming
  - Other: \_\_\_\_\_
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### Income

**Crop Sales:** \$ \_\_\_\_\_

**Livestock Sales:** \$ \_\_\_\_\_

**Government Subsidies / Farm Programs:** \$ \_\_\_\_\_

**Crop Insurance Proceeds:** \$ \_\_\_\_\_

**Custom Work / Agricultural Services Income:** \$ \_\_\_\_\_

**Other Farm Income:** \$ \_\_\_\_\_

Please attach:

- 1099s (including 1099-G, 1099-NEC)
- Sales records / invoices
- Commodity statements
- Co-op or elevator statements

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## Farm Supplies & Inputs

Seed & Plants: \$ \_\_\_\_\_

Feed & Supplements: \$ \_\_\_\_\_

Fertilizer & Soil Amendments: \$ \_\_\_\_\_

Pesticides / Herbicides: \$ \_\_\_\_\_

Veterinary Supplies & Medicine: \$ \_\_\_\_\_

Bedding Materials: \$ \_\_\_\_\_

Packaging & Harvest Supplies: \$ \_\_\_\_\_

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## Livestock Expenses

Purchase of Livestock: \$ \_\_\_\_\_

Animal Feed: \$ \_\_\_\_\_

Veterinary Services: \$ \_\_\_\_\_

Breeding Costs: \$ \_\_\_\_\_

Livestock Equipment: \$ \_\_\_\_\_

Animal Identification / Tagging: \$ \_\_\_\_\_

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## Fuel, Repairs & Equipment

Fuel (Farm Use): \$ \_\_\_\_\_

Repairs & Maintenance (Equipment): \$ \_\_\_\_\_

Parts & Supplies: \$ \_\_\_\_\_

Equipment Rental: \$ \_\_\_\_\_

Equipment Lease Payments: \$ \_\_\_\_\_

Equipment Purchases (small tools): \$ \_\_\_\_\_

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## Large Equipment & Depreciable Assets

Please list major purchases (tractors, combines, etc.)

**Description Date Purchased Cost**

Examples:

- Tractors
  - Harvesters
  - Irrigation systems
  - Livestock trailers
  - Barn equipment
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## Farm Vehicle Expenses

Farm Truck Expenses: \$ \_\_\_\_\_

Gas & Diesel: \$ \_\_\_\_\_

Repairs & Maintenance: \$ \_\_\_\_\_

Insurance: \$ \_\_\_\_\_

Registration & Licensing: \$ \_\_\_\_\_

Farm Use Mileage (if applicable): \_\_\_\_\_ Miles

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## Land & Property Expenses

Rent/Lease of Farmland: \$ \_\_\_\_\_

Property Taxes: \$ \_\_\_\_\_

Mortgage Interest (Farm Portion): \$ \_\_\_\_\_

Land Improvements (fencing, drainage, clearing): \$ \_\_\_\_\_

Conservation Expenses: \$ \_\_\_\_\_

Water Rights / Irrigation Fees: \$ \_\_\_\_\_

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## Utilities & Operating Costs

Electricity (Farm Use): \$ \_\_\_\_\_

Water: \$ \_\_\_\_\_

Propane / Heating Fuel: \$ \_\_\_\_\_

Internet / Phone (Farm Use Portion): \$ \_\_\_\_\_

Storage Facility Rent: \$ \_\_\_\_\_

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## Labor & Contract Services

Employee Wages: \$ \_\_\_\_\_

Contract Labor / Seasonal Workers: \$ \_\_\_\_\_

Harvesting Services: \$ \_\_\_\_\_

Equipment Operators: \$ \_\_\_\_\_

Custom Farming Services Paid: \$ \_\_\_\_\_

Payroll Taxes: \$ \_\_\_\_\_

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## Insurance

Crop Insurance Premiums: \$ \_\_\_\_\_

Livestock Insurance: \$ \_\_\_\_\_

Farm Liability Insurance: \$ \_\_\_\_\_

Equipment Insurance: \$ \_\_\_\_\_

Workers' Compensation: \$ \_\_\_\_\_

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## Farm Administration & Office Expenses

Accounting & Bookkeeping: \$ \_\_\_\_\_

Office Supplies: \$ \_\_\_\_\_

Software / Farm Management Systems: \$ \_\_\_\_\_

Legal & Professional Fees: \$ \_\_\_\_\_

Memberships (Farm Bureau, Co-ops): \$ \_\_\_\_\_

Licensing & Permits: \$ \_\_\_\_\_

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## Marketing & Sales Expenses

Market Fees / Auction Fees: \$ \_\_\_\_\_

Transportation to Market: \$ \_\_\_\_\_

Advertising / Direct Sales: \$ \_\_\_\_\_

Packaging & Branding: \$ \_\_\_\_\_

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## Conservation & Environmental Expenses

Soil Conservation Projects: \$ \_\_\_\_\_

Water Conservation Systems: \$ \_\_\_\_\_

Sustainability Programs: \$ \_\_\_\_\_

Government Program Compliance Costs: \$ \_\_\_\_\_

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## Travel & Meals

Farm Supply Travel: \$ \_\_\_\_\_

Lodging: \$ \_\_\_\_\_

Meals While Traveling: \$ \_\_\_\_\_

Agricultural Conferences: \$ \_\_\_\_\_

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## Retirement Contributions

SEP IRA: \$ \_\_\_\_\_

Solo 401(k): \$ \_\_\_\_\_

Traditional IRA: \$ \_\_\_\_\_

Roth IRA: \$ \_\_\_\_\_

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## Estimated Tax Payments

Federal Estimated Taxes: \$ \_\_\_\_\_

State Estimated Taxes: \$ \_\_\_\_\_

Dates Paid: \_\_\_\_\_

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## Other Expenses

Please list any additional farm-related expenses:

Description	Amount
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\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

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## Questions

Did you purchase or sell land this year?

Yes  No

Did you purchase or sell major equipment?

Yes  No

Did you receive government farm program payments?

Yes  No

Did you experience a crop or livestock loss?

Yes  No

Did you hire seasonal or migrant workers?

Yes  No

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## Additional Notes

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## Client Certification

I certify that the information provided is complete and accurate to the best of my knowledge. I understand that supporting documentation may be required.

**Client Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_