

FARM WORKSHEET YEAR: _____

Name _____ Date of Birth _____
 Spouse _____ Date of Birth _____
 Address _____
 Phone Number _____
 Children's Names, Other Exemptions, **dates of birth**, & **Soc. Sec. #**

Taxpayer's Social Security # _____
 Spouse's Social Security # _____
 Taxpayer Presidential Fund..... Yes No
 Spouse Presidential Fund..... Yes No

Adjustments to Income

IRA payments (regular) Spouse \$ _____ Taxpayer \$ _____
 Keogh or SEP Payments \$ _____
 ROTH IRA payments Spouse \$ _____ Taxpayer \$ _____
 Moving expense \$ _____
 Student loan interest paid (bring in form 1098G) \$ _____
 Other..... \$ _____

Credits

Child Care paid (bring Form W-10) \$ _____
 Education credits (bring in form 1098T)..... \$ _____
 Other..... \$ _____

Medical Expenses & Deductions

Health Insurance Premiums \$ _____
 Medicine \$ _____
 Doctors..... \$ _____
 Mileage (or transportation) # of miles _____ \$ _____
 Glasses, x-ray, etc. \$ _____
 Other..... \$ _____
 Medical reimbursements for expenses listed above..... \$ _____

Taxes & Interest Personal

Car tabs (not farm) \$ _____
 State income tax (paid for prior year)..... \$ _____
 Real property taxes (home) \$ _____
 Personal interest paid home (bring Form 1098) \$ _____
 Investment interest paid \$ _____
 Other..... \$ _____

Contributions

Paid to church (bring receipts) \$ _____
 To others \$ _____
 _____ \$ _____
 Clothing & household @FMV to: _____ \$ _____
 _____ \$ _____
 Mileage for charity # of miles _____ \$ _____
Total \$ _____

Payments

Federal estimated taxes paid and dates paid \$ _____
 _____ \$ _____
 State estimated taxes paid and dates paid \$ _____
 _____ \$ _____
 Nonhighway gas tax (bring receipts) # of gal. _____ \$ _____

Questions to ask Tax Preparer:

Personal Income

Wages (bring W-2 Form) \$ _____
 Interest on government bonds (bring 1099) \$ _____
 Interest on mortgages, savings, CDs, etc. (bring 1099) \$ _____
 Interest on tax exempt (bring 1099)..... \$ _____
 Interest forfeited..... \$ _____
 Corporation stock dividends (bring 1099) \$ _____
 Soc. Sec. benefits or railroad retirement (bring 1099) .. \$ _____
 Oil lease rental or bonus, and oil royalties \$ _____
 Cash rent received (bring 1099) \$ _____
 Pensions (bring 1099)..... \$ _____
 Unemployment (bring 1099) \$ _____
 Gambling winnings (bring 1099 & letter)..... \$ _____
 Miscellaneous \$ _____

Sale of Purchased or Raised Livestock (cattle, swine, sheep, horses) Used for Dairy, Breeding or Draft

Kind	Date Purch or Birth	Cost	Date Sold	Selling Price
		\$		
		\$		
		\$		
		\$		

Sale of Machinery, Buildings, Land and Minerals

Kind	Date Purch or Birth	Cost	Date Sold	Selling Price
		\$		
		\$		
		\$		
		\$		

Investments and Improvements

List all livestock, farm buildings constructed, farm machinery, tractors, equipment and car or truck purchases for farm use. List major improvements made. Give date of purchase and cost. **Bring invoices.**

Additions to Depreciation Schedule

Machinery, Bldgs., Bldg. Improvements, Breeding Livestock or Dairy Herd	Kind of Property	Date of Purch.	Cost
1.			\$
2.			\$
3.			\$
4.			\$
5.			\$
6.			\$

Trade-Ins (bring invoices)

Kind of Old Machine and Date of Purchase	Kind of New Machine and Date of Purchase	Payment in addition to trade-in
1.		\$
2.		\$
3.		\$
4.		\$
5.		\$
6.		\$

I certify that this information is true and correct (sign and date): _____,

PLEASE ROUND ALL INCOME AND EXPENSES TO THE NEAREST DOLLAR

Principal Product _____ Cash or Accrual Employer I.D. # _____ Did you materially participate? Yes No

F A R M I N C O M E

Sale of Purchased Feeder Stock (cattle, swine & other stock)				
Kind	Date Sold	Sale Price	Date Purch	Cost
_____	_____	\$ _____	_____	\$ _____
_____	_____	\$ _____	_____	\$ _____
_____	_____	\$ _____	_____	\$ _____
_____	_____	\$ _____	_____	\$ _____
Totals		\$ _____	_____	\$ _____
Profit				\$ _____

Sale of Livestock, Grains, and other products raised	
Dairy, breeding or draft livestock such as cows, bulls, ewes, horses (enter on front page)	
Calves and feeders (raised—no cows).....	\$ _____
Lambs and sheep (raised)	\$ _____
Butcher hogs and feeder pigs (raised)	\$ _____
Poultry	\$ _____
Dairy products.....	\$ _____
Grains (wheat, barley, oats, corn, etc.) ...	\$ _____
Hay and straw	\$ _____
Miscellaneous	\$ _____
Total raised products	\$ _____

Patronage dividends and per unit retained (bring statements).....	\$ _____
Less nonincome items	\$ _____
Net patronage dividends and per units retained ..	\$ _____
Agricultural program payments:	
a. Cash (bring statement)\$.....	taxable \$ _____
Commodity credit loans under elections.....	\$ _____
CCC loans forfeited or repaid with certs \$.....	taxable \$ _____
Crop insurance and hail insurance proceeds (bring in 1099) \$.....	taxable \$ _____
Deferred to _____ Check <input type="checkbox"/>	amount deferred from last year \$ _____
Custom work, etc.	\$ _____
Federal gasoline tax credit	\$ _____
State gasoline tax refund	\$ _____
Other (specify)	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total	\$ _____
Gross Income	\$ _____

F A R M E X P E N S E S

Car & Pickup Operating Expenses	Vehicle 1	Vehicle 2	Vehicle 3
Year & make of vehicle(s):	_____	_____	_____
Gas, oil, grease & anti-freeze... \$	\$ _____	\$ _____	\$ _____
Repairs, tires, batteries, etc. \$	\$ _____	\$ _____	\$ _____
Insurance, interest..... \$	\$ _____	\$ _____	\$ _____
License	\$ _____	\$ _____	\$ _____
Totals \$	\$ _____	\$ _____	\$ _____
Mileage (end of year)	_____	_____	_____
Mileage (start of year)	_____	_____	_____
Mileage (this year).....	_____	_____	_____
_____ % personal use \$	\$ _____	\$ _____	\$ _____
Vehicle farm share	\$ _____	\$ _____	\$ _____
Grain truck operating expense	\$ _____	_____	_____
Total vehicle expense	\$ _____		
Chemicals	\$ _____		
Conservation expense (bring approved plan)	\$ _____		
Custom hire (baling, combining, corn picking, etc.)... \$	\$ _____		
Depreciation	\$ _____		
Employee benefit programs	\$ _____		
Feed purchased (hay, grain, etc./grinding & mixing) .. \$	\$ _____		
Fertilizer, lime	\$ _____		
Freight & trucking	\$ _____		
Gas, fuel, lubrication oil & grease (tractor/equip. only) \$	\$ _____		
Insurance (do not include car, pickup or medical)			
Hail and crop insurance.....	\$ _____		
Farm liability insurance.....	\$ _____		
Fire and wind	\$ _____		
Less for house.....	\$ (_____)		
Farm share	\$ _____		
Interest paid on farm mortgage obligations to financial institutions: (Do not include house—should match Form 1098)	\$ _____		
Interest paid on other farm obligations	\$ _____		
Labor hired (Should match W2s)	\$ _____		
Pension and profit sharing	\$ _____		

Rent or lease farm vehicles, machinery	\$ _____
Rent or lease of farm land, animals, etc.	\$ _____
Repairs to farm machinery, buildings, fences, etc.....	\$ _____
Seed and plants (corn, beans, etc./cleaning & treating)	\$ _____
Storage, warehousing	\$ _____
Supplies (small tools, shovels, filters, rope, etc.)	\$ _____
Taxes	
Real Estate (bring in real estate stmt.)	\$ _____
Soc.Sec. tax paid on employees	\$ _____
Miscellaneous taxes	\$ _____
Total taxes	\$ _____
Water (total for year).....	\$ _____
Electricity (total for year).....	\$ _____
Total paid (water & electricity).....	\$ _____
Less _____ % for personal use	\$ _____
Farm share (water & electricity).....	\$ _____
Telephone (extra business rates and long distance only, cell phone (farm portion) \$	\$ _____
Utilities (farm share of water, electricity & phone)	\$ _____
Veterinary fees, breeding, medicine	\$ _____
Accounting and legal	\$ _____
Advertising	\$ _____
CCC loans repurchased bu.	\$ _____
Groceries purchased for paid hired help.....	\$ _____
Farm organization dues.....	\$ _____
Repayment of prior years ASCS payment	\$ _____
Other.....	\$ _____
a.....	\$ _____
b.....	\$ _____
c.....	\$ _____
d.....	\$ _____
e.....	\$ _____
Total expenses	\$ _____
Net Farm Profit (or loss)	\$ _____
Do you have amounts for which you are not at risk? . Yes <input type="checkbox"/> No <input type="checkbox"/>	
Do Forms 1099 need to be filed (for rent, custom hire, etc.)?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you refinanced loans where the interest has been added to the note?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Did you have any loans reduced or forgiven?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you interested in Bookkeeping Service?	Yes <input type="checkbox"/> No <input type="checkbox"/>