



Dairy SPR Information Checklist

By filling out this form, you agree to participate in Horizon Farm Credit's Dairy Success and Profitability Review (Dairy SPR) benchmark program in 2024. All information provided is confidential. Only summarized information by herd size groups are available to participating farms.

FARM NAME: _____

FARM CONTACT/PERSON SUBMITTING INFORMATION: _____

PHONE #: _____ EMAIL: _____

PREFERRED CONTACT METHOD: PHONE EMAIL

ARE YOU A HORIZON FARM CREDIT TAX AND/OR RECORDS CUSTOMER? YES NO

1. Complete a detailed balance sheet as of 12/31/2023.

If you have a balance sheet from a CPA or other source, please return it with this form. If you already submitted a balance sheet to Farm Credit, you do not need to submit an additional balance sheet. *First year Dairy SPR participants must also provide a balance sheet as of 12/31/2022.*

2. Provide a full copy of your 2023 income tax return (plus depreciation schedule).

If you work with an outside accountant, reach out to your Farm Credit contact for a release form so your accountant can provide your tax return directly to Farm Credit. Some accountants do not automatically include your depreciation schedule, so you may need to ask for it separately.

If you are not able to provide a tax return, please provide one of the following:

- Computer Records - Preferably a back-up of your file if using QuickBooks or CenterPoint software. Otherwise, provide a detailed Profit & Loss Report and Cash Flow Statement.
- Paper Records - Rosie Zaginaylo for assistance.

3. Provide access or copies of your monthly milk checks. These should include your December 2022 milk check and all 12 monthly milk checks for 2023. You have three options for providing milk check information. Please select the option of your choice:

- Complete and sign a consent form for your milk cooperative. (*Available for Land O'Lakes, Maryland & Virginia and DFA-Northeast*)
- Provide login information to obtain records online directly from your milk handler.
Milk handler name: _____
Username: _____ Password: _____
- Provide copies of the necessary 13 monthly milk checks (January – January).

4. Provide access to DHIA data or herd information. Identify which option Farm Credit should use to access this information:

- Provide a copy of your DHIA 202 herd summary sheet closest to 12/31/23 date.
- Provide herd and RAC codes for Farm Credit to access the information electronically.
Herd Code (8 digits): _____ RAC Code (4 digits): _____
- If not on DHIA test, provide the following:
Average number of cows for 2023: _____ Total cows died in 2023: _____
Average Somatic Cell Count for 2023: _____



5. Provide information on number of animals purchased in 2023.

Type	Number purchased	Total cost
Heifers <1 year old purchased		\$
Heifers >1 year old purchased		\$
Cows purchased		\$

6. Indicate any capital expenditures from 2023.

Type	Description	\$ Value
Livestock		\$
Equipment		\$
Major Repair Expenses		\$
Real Estate/Real Estate Improvements		\$

7. Did you start or finish a construction project in 2023? Yes No

8. If you have any leases, provide the appropriate information below.

Leasing Company / Purpose	Date Incurred	\$ Original Amount	\$ Monthly Payment	\$ Balance
				\$
				\$
				\$
				\$

9. Provide information on number of total tillable acres farmed in 2023.

_____ Total acres farmed (tillable and pasture)

10. Provide information on Full Time Worker Equivalents by showing a breakdown of hours worked by everyone providing farm labor in 2023.

Type	# of hours worked	Hours provided are weekly or yearly?
Total owner hours		<input type="checkbox"/> Weekly <input type="checkbox"/> Yearly
Total other family hours		<input type="checkbox"/> Weekly <input type="checkbox"/> Yearly
Total hired labor hours		<input type="checkbox"/> Weekly <input type="checkbox"/> Yearly

11. Did you have any non-typical or extraordinary events this year? Could be personal or business related. *Examples: wedding, major medical expense, college, major sale of assets.*

Yes No

If yes, please describe:

12. Do you have any corrections to report for the previous year's Dairy SPR data?

Yes No

If yes, please describe:

13. Share any other information or miscellaneous notes.