



TREASURE VALLEY CPA

9446 W. Fairview Ave.

Boise, ID 83704

208-322-0720

www.treasurevalleycpa.com

Please provide the items below for your tax preparation if applicable.

TAX PREPARATION CHECKLIST

Document Checklist	✓	Check what applies
Wage Statements	<input type="checkbox"/>	Form W2's
Commissions, Misc. income	<input type="checkbox"/>	Form 1099-MISC's
Interest and Dividends	<input type="checkbox"/>	Form 1099-INT, 1099-OID, 1099-DIV
Partnership/S-Corp/Estate/ Trust	<input type="checkbox"/>	Form K1
Sales of Stocks or Bonds, Crypto	<input type="checkbox"/>	Broker Statements, Form 1099-B, Form 1099-S
Rental/Royalty Income	<input type="checkbox"/>	\$ _____
Pension/IRA/Annuity Income	<input type="checkbox"/>	Form 1099-R
Social Security/RRB Income	<input type="checkbox"/>	Form SSA-1099, Form RRB-1099
Unemployment, State Tax Refund	<input type="checkbox"/>	Form 1099-G
Student Loans Interest	<input type="checkbox"/>	Form 1098-T
Alimony Received	<input type="checkbox"/>	\$ _____
Farm Income	<input type="checkbox"/>	\$ _____
Stimulus, Advanced Child Credit	<input type="checkbox"/>	<u>2021 Only-Form 6475, Form 6419</u>

Child and Other Dependent Care Expenses

WE NEED:

Name of Provider _____

Address _____

SSN or Federal EIN _____

Amount Paid \$ _____

Do you own a rental property? Yes No

New Clients: Please provide previous Year's Tax Return, Social Security Numbers and birth dates for all family members on the return, and a copy of Driver's License or ID.