

SIMPLETAX Inc.

Professional Tax and
Accounting Services.



1040 TAX CHECKLIST

2025

1. General Information and Prior Year Documentation

- ☐ Proof of identity for those claimed on the return (driver's license or state issued ID, Social Security card, birth certificates for children. etc.)
- ☐ Income tax returns from the prior two years (If there were losses from business activities in prior years, include prior five years of returns instead of two)
- ☐ Depreciation schedules from prior years for businesses, rentals,

2. Current Year Income Documentation

- ☐ Wage and tax statements (Form W-2)
- ☐ Gambling income (Form W2-G)
- ☐ IRA distributions, pensions, and annuities (Form 1099-R)
- ☐ Dividend income (Form 1099-DIV)
- ☐ Interest income (Form 1099-INT)
- ☐ Miscellaneous income (Form 1099-MISC)
- ☐ Non-employee compensation (Form 1099-NEC)
- ☐ Unemployment compensation and other government payments (Form 1099-G)

- ☐ Credit card, debit card, and third-party network transactions (Form 1099-K)
- ☐ Reportable payment transactions
- ☐ Social Security benefits (Form SSA-1099)
- ☐ Railroad retirement benefits (Form RRB-1099)
- ☐ Income from partnerships, S corporations, estates, and trusts (Schedule K-1)
- ☐ Basis information for any partnerships and S corporations
- ☐ Documentation of brokerage transactions and disposition of capital assets (Form 1099-B)
- ☐ Digital asset proceeds from brokerage transactions (Form 1099-DA)
- ☐ Proceeds from real estate transactions (Form 1099-S)
- ☐ Self-employed business income (Schedule C)
- ☐ Farm income (Schedule F)
- ☐ Farm rental income (Form 4835)
- ☐ Income from rental real estates and royalties (Schedule E)

3. Other Income

Provide supporting documentation for income received for the following items

- ☐ Sale of assets or property
- ☐ Cancellation of debt
- ☐ Other income

4. Payments

provide supporting documentation for payments made for the following items

- ☐ Educator classroom expenses
- ☐ Employee business expenses

- ☐ Contributions to a Health Savings Account
- ☐ Expenses related to work relocation with the military
- ☐ Alimony
- ☐ Student loan interest
- ☐ Refunded student loan interest payments
- ☐ Student loan forgiveness
- ☐ Tuition and fees for higher education
- ☐ Expenses related to child or dependent care
- ☐ Contributions to a Retirement Savings Account
- ☐ Medical and dental expenses
- ☐ Real estate taxes
- ☐ Other state and local taxes
- ☐ Mortgage interest
- ☐ Investment interest
- ☐ Cash contributions
- ☐ Non-cash contributions (provide organization name)
- ☐ Un-reimbursed employee expenses
- ☐ Investment expenses
- ☐ Gambling losses
- ☐ Other payments

Stressed about Tax Filing?

Let the Experts handle it!

[Visit Our Website](#)

Or Call us at

+1 (510) 509 6334

+1 (860) 879 4730

