



DIFFERENT DOLLAR
CONSULTANTS & CO.

TAX PREP CHECKLIST

Personal Identification

- Unexpired State ID or Driver's License
- Social Security Card(s) for taxpayer, spouse, and dependents
- Birth Certificate(s) (for dependents if claiming credits)

Deductions & Credits

- Childcare expenses & provider info
- 1098-T (tuition) or 1098-E (student loan interest)
- 1098 (mortgage interest) & property taxes
- Charitable donations
- Medical & dental expenses
- Retirement contributions (IRA, 401k)

Banking Information

- Bank Routing and Account Number for Direct Deposit

Income Documents

- W-2s from all employers
- 1099s (NEC, MISC, G, R, SSA, INT, DIV)
- K-1s (partnership or S-corp income)
- Business receipts or expense logs (self-employed)
- Year-end gig statements (Uber, DoorDash, etc.)
- Proof of any cash income

Business Owners (if applicable)

- Profit & Loss Statement or Income Summary
- Business Expense Receipts
- Mileage Log or Vehicle Expense Records
- Business Bank Statements
- Home Office Square Footage (if applicable)

Additional Items

- Prior Year Tax Return (if not filed with us)
- IRS or State Notices (if received)

F I L E T O D A Y