



NAV ACCOUNTS
NAVRISHAM KHAIRA E.A.

1469 Butte House Rd, Suite E, Yuba City, CA,95993.

530-777-3265 khairanavrisham@gmail.com

Tax Prep Checklist

For All Personal Tax Filers

- ❖ Last 2 years Tax Returns
- ❖ Copy of SSN for Taxpayer & dependents
- ❖ Copy of Valid DMV ID/DL
- ❖ Copy of ITIN as applicable
- ❖ Business Legal docs including SS-4
- ❖ Current Mailing Address proof

For All Business Tax Filers

- ❖ Last 2 years Tax Returns
- ❖ Copy of SSN for Taxpayer & dependents
- ❖ Copy of Valid DMV ID/DL
- ❖ Copy of ITIN as applicable
- ❖ Business Legal docs including SS-4
- ❖ Current Mailing Address proof

Business Filing Documents

- ❖ Income & Exp
- ❖ Jan & Dec Bank Statement
- ❖ Jan & Dec Loan Statement
- ❖ Change on Assets Sheet
- ❖ Actual Mileage Sheet
- ❖ Payroll – 940 & w3

Personal Income & Earnings

W2s & All 1099s Earnings

Itemized Deductions

- ❖ 1098 Mortgage Interest Paid
- ❖ Property Taxes
- ❖ Medical Expenses Paid
- ❖ Charity receipts for Cash & non-Cash
- ❖ Out of pocket Medical Expenses receipts

Other Deductions

- ❖ HSA & IRA Contributions
- ❖ Student Loan & Tutoring
- ❖ Job Search Expenses
- ❖ Moving Expenses
- ❖ Self Employed Health ins.

Personal Credits

- ❖ Residential Solar Energy installed Invoice.
- ❖ Health Insurance 1095-A/B/C as applicable
- ❖ Degree Students – 1098 -T & Equip. Cost
- ❖ Professional Education – Cost of Course
- ❖ Day Care Expenses
- ❖ New/Used Electric or Hybrid Vehicle Purchase
- ❖ Tax Letter in case to restrict to claim specific credit.

If you need additional assistance please send us an email at: navaccounts@yahoo.com Thank you!