

Ferrigno Tax & Accounting Services

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What to Have for Your Appointment- New Client

- 🍏 Social Security card(s)
- 🍏 Driver's License(s)
- 🍏 Dependents' Social Security numbers and dates of birth*
- 🍏 Wage statements
- 🍏 W-2s
- 🍏 Last year's Federal and State tax return
- 🍏 Self-employment business income and expenses/ 1099-MISC*/ 1099K
- 🍏 Form 1095-A (Health Insurance Marketplace Statement)**
- 🍏 Exemption Certificate Number***
- 🍏 Commissions received/paid*
- 🍏 Pension, retirement income/ 1099-R*
- 🍏 Unemployment income/ 1099-G*
- 🍏 Canceled Debt Amount/ 1099-C*
- 🍏 Social Security income/ SSA-1099*
- 🍏 IRA contributions*
- 🍏 Statements on the sales of stocks or bonds/1099-B*
- 🍏 Interest and dividend income/ 1099-INT/ 1099-DIV*
- 🍏 Lottery or gambling winnings/losses*
- 🍏 State refund amount/1099-G*
- 🍏 Income and expenses from rentals*
- 🍏 Alimony paid or received*
- 🍏 Record of purchase or sale of residence*
- 🍏 Medical and dental expenses*
- 🍏 Real estate and personal taxes*
- 🍏 State or local taxes paid
- 🍏 Sales tax paid
- 🍏 Estimated taxes or foreign taxes paid*
- 🍏 Cash and non-cash charitable donations*
- 🍏 Mortgage or home equity loan interest paid/ 1098*
- 🍏 Unreimbursed employment-related expenses*
- 🍏 Job-related educational expenses*
- 🍏 Educator expenses*
- 🍏 Tuition and Education Fees/ 1098-T*
- 🍏 Student loan interest/ 1098-E*
- 🍏 Moving expenses*
- 🍏 Casualty or theft losses*
- 🍏 Child care expenses and provider information*
- 🍏 Bank statements for Business*

*If Applicable

**If you received health insurance from Marketplace

***If you received an exemption from needing health insurance from the Marketplace (exchange)