



Ferrara Tax Group

Income:

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| W-2 | Employer remits to the IRS and employee to communicate wages earned and taxes withheld |
| 1099-DIV | Dividends income |
| 1099-INT | Interest income |
| 1099-B | Investment gains and losses |
| 1099-MISC | Non-employee wages (i.e. contractor) |
| 1099-G | Unemployment compensation, state or local income tax refunds, credits, or offsets |
| 1099-R | Distributions from a retirement plan |
| 1099-SSA | Social security benefits received |
| 1099-SA | Distributions from health savings, medial savings, and Medicare Advantage accounts |
| W-2G | Gambling income |
| 1099-OID | Original Issue Discount interest or the excess of redemption price over issue price (i.e. bonds) |
| K-1 | Share of partnership income, losses, deductions, and credits |

Deductions:

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| 1098-MTG | Mortgage interest, premiums, and real estate taxes paid |
| 1098-T | Tuition statement |
| 1098-E | Student loan interest paid |
| Property Tax Assessment Card - Assessed value of home and real estate taxes | |
| 5498 | IRA contributions, rollovers, Roth IRA conversion, and required minimum distributions (RMDs) |
| 1095-A/B/C | Proof of health insurance |
| Medical expense receipts or summary totals | |
| Charitable contributions receipts or summary totals | |
| Job expenses | Union dues, subscriptions to periodicals, travel expenses, uniform fees, dry cleaning of uniform, legal fees, licensing fees, supplies, tools, etc. |