



## Wildhorse Tax Service, LLC

7400 W 130th Street, Suite 100  
Overland Park, KS 66213  
(913) 904-0447

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### Upload the following to the portal

- Completed Client Information form (**attached**)
- Copy of your driver's license(s)
- W-2 from wages or gambling income
- Any Form 1099 (typically from a bank or broker, self-employment, unemployment, or social security)
- Any Form 1098 (mortgage interest, college tuition or student loan interest paid)
- Form 1095-A (**ONLY** if you had health insurance through the healthcare exchange.)
- Form K-1 (from interest in a Partnership, S-Corporation or Trust)
- Completed Business Income/Expense and or Rental Income/Expense worksheets if applicable (The worksheets can be found on the Forms page of our website.)
- The HUD statement (two summary pages from the closing if you refinanced your mortgage or purchase/sold a home)
- Prior year's tax return (**ONLY** if you are a new client)

Please **DO NOT** upload receipts such as personal property tax receipts, charity donations, etc.



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\* If you are a previous client - only fill out the info which has changed.

Taxpayer Name: \_\_\_\_\_ SSN: \_\_\_\_\_

Occupation: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ SSN: \_\_\_\_\_

Occupation: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Address: \_\_\_\_\_ (street, city, state, zip)

Marital Status: \_\_\_\_\_ Phone (cell): \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone (day): \_\_\_\_\_

Dependents Name: (first and last name)	Date of Birth (mm/dd/yy)	Dependent's Social Security Number	# of months they lived in your home last year	Relationship

If a child did not live with you, but is claimed as your dependent check here: \_\_\_\_

Did you have Child Care Expenses? Yes / No (circle one)

Provider's Tax ID #: \_\_\_\_\_ Amount Paid to Provider: \_\_\_\_\_

Provider's Name & Address: \_\_\_\_\_



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Alimony Paid: \_\_\_\_\_ Recipient's SSN: \_\_\_\_\_ Date Divorced: \_\_\_\_\_

Student Loan Interest Paid: \$ \_\_\_\_\_

Teacher expenses (only if you taught K-12): \$ \_\_\_\_\_

Did you contribute to a 529 college savings plan? If so, Amount: \$ \_\_\_\_\_

Amount of Sales tax paid if you purchased a new vehicle. \$ \_\_\_\_\_

Personal Property Taxes Paid(ie car,boat): \_\_\_\_\_ Real Estate Tax Paid: \_\_\_\_\_

Charitable contributions: Cash or check \$ \_\_\_\_\_ Non-Cash Value \$ \_\_\_\_\_

Did you buy or sell a residence this year? Yes / No

Amount paid if you installed a new HVAC, water heater, solar or geothermal unit? \_\_\_\_\_

Amount paid if you installed new energy efficient exterior doors or windows. \_\_\_\_\_

Did you pay for a Home Energy Audit? Yes / No If so, amount paid: \$ \_\_\_\_\_

Did you purchase an electric vehicle? Yes / No Was it new or used? Amount paid: \_\_\_\_\_

Did you receive, sell, send, exchange or otherwise acquire interest in any virtual currency? Yes / No

Amount paid for Long Term Care Insurance premiums. \$ \_\_\_\_\_

Amount paid for Health Ins. Prem. (don't include premiums deducted from your paycheck): \$ \_\_\_\_\_

Amount of IRA Contributions(by the taxpayer): \_\_\_\_\_ Type of IRA: \_\_\_\_\_

Amount of Spouse IRA Contribution: \_\_\_\_\_ Type of IRA: \_\_\_\_\_

### **City of Kansas City, MO**

Did you live or work in KCMO during the year? If so, circle one or both. (Lived in - Worked in)

Were Kansas City, Missouri taxes withheld from your paycheck? Yes / No

If KCMO taxes were withheld from your paycheck and you worked remotely, how many days did you work remotely outside of Kansas City, Missouri? \_\_\_\_\_