Wildhorse Tax Service, LLC

Voice: (913) 904 – 0447
Fax: (913) 815 – 1257
Email: info@wildhorsetaxservice.com

Personal Info

- ☐ Government issued ID (Driver's lic., Passport, etc)
- ☐ Prior year's tax return (New Clients Only)
- ☐ Birth date & SSN for everyone on return
- ☐ Amount of alimony paid & SSN of ex-spouse
- ☐ Daycare provider's Tax ID #, address & amount pd.
- ☐ Form 8332 if you are claiming a child, but you are not the custodial parent.

Income

- ☐ W-2 forms
- ☐ Unemployment or State refund received (1099-G)
- ☐ Gambling Income and expenses (W-2G)
- ☐ Alimony received
- ☐ Jury Duty income
- ☐ Hobby Income & Expenses
- ☐ Prizes and awards
- ☐ Other Income

Savings & Investments

- ☐ Interest or Dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sale of stock or other property (1099-B or 1099-S)
- ☐ Dates of acquisition & cost basis of property sold

Retirement & Health Ins. Information

- ☐ Pension / IRA / Annuity (1099-R)
- ☐ Social Security or Railroad Retirement (1099-SSA, RRB-1099)
- ☐ Amount contributed to IRA
- ☐ Amount withdrawn or transferred (1099-R)
- ☐ Health Savings Acct. withdraws or contributions (1099-SA)
- ☐ Form 1095-A if you were enrolled in a Marketplace Health Insurance plan

Education

- ☐ Tuition paid (1098-T)
- ☐ Student Loan interest paid (1098-E)
- ☐ Amount paid for books or computer
- ☐ Amount contributed to or withdrawn from College Savings Acct. (1099-Q)

Rental Income

- ☐ Asset information including purchase & sale information or depreciation schedule
- ☐ Completed Rental Income & Expense worksheet from our website

Self Employment, Trust or Business Info

- ☐ K-1
- ☐ Form 1099-MISC & 1099-NEC
- ☐ Completed Business Income & Expense worksheet from our website
- ☐ Depreciation schedule
- ☐ Automobile business mileage and tolls paid

Deductions or Credits

- ☐ Personal Property tax paid
- ☐ Mortgage Interest paid (Form 1098)
- ☐ Real Estate tax paid
- ☐ Prior years State & Local income taxes paid
- ☐ HUD closing stmt if you purchased/sold real estate or refinanced a mortgage
- ☐ List of Charitable monetary donations
- ☐ Records of non-cash Charitable donations
- ☐ Miles driven for charity or medical purposes
- ☐ Medical expenses (if greater than 7.5% of your income)
- ☐ K-12 Teacher expenses - up to $250
- ☐ Adoption expenses
- ☐ Electric vehicle (credit form from dealer)
- ☐ Energy credits (purchase receipts for solar panels, windows, doors, HVAC, etc.)
- ☐ National Guard mileage
- ☐ Military moving expenses
- ☐ MO residents – Military active duty pay (LES & orders)

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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: ____

Alimony Paid: __________ Recipient's SSN: _____________________ Date Divorced:__________

Student Loan Interest Paid: $____________

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

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

We need the 1099-Q if you withdrew money from a 529 college savings plan or Educational Savings acct.

Did anyone in your household incur educational expenses? Yes / No

Amount of Sales tax paid if you purchased a new vehicle or other large item $____________

Personal Property Taxes Paid(ie car,boat): ______________ Real Estate Tax Paid:_______________

Charitable Donations: Cash or check $___________ Non-Cash Value $_______________

Were any charitable donations made directly from your IRA (via Qualified Charity Distribution)? Yes / No

Did you buy or sell your primary residence this year? If so, we need the closing statement.

Original price paid for the house you sold: __________ Date it was originally purchased: _____________

Amount spent on major improvements during ownership: _________

Did you sell any other real estate? If so, we need the purchase and sale info to calculate the gain or loss.

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): $________

Did you purchase health insurance via www.healthcare.gov? If so, we must have your Form 1095-A.

Amount of IRA Contributions(separate from work plan): __________ Type of IRA: ___________

Amount of Spouse IRA Contribution: __________ Type of IRA: ___________

Have you had a tax credit disallowed such as Earned income credit, Child tax credit or College tax credits? ____

Did you make estimated tax payments to the Fed or any state? If so, we need the dates and amounts of each.

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? _____________