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- ☐ Amount withdrawn or transferred (1099-R)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- ☐ Amount contributed to or withdrawn from College Savings Acct.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

- ☐ Mortgage Interest paid (Form 1098)
- ☐ Personal Property tax paid (car, boat, etc)
- ☐ Real Estate tax paid
- ☐ Prior years State & Local income taxes paid
- ☐ HUD closing statement 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
- ☐ National Guard mileage
- ☐ Military moving expenses
- ☐ MO residents – Military active duty pay (LES & orders)

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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 Soc. Sec. Number	# of months they lived in your home last year or at college	Relationship

• Do you or any of your dependents have an IP PIN issued by the IRS? **Yes / No (circle one)** If yes, you must provide your preparer with the PIN(s).
• Did you incur Child Care Expenses? **Yes / No**

Provider's Tax ID #:_____ Amount Paid to Provider:_____

Provider's Name & Address: _____

• Do you have a child that was born this year? If so, would you like to establish a Trump account for this child so that the child may receive $1000 from the U.S. Treasury? **Yes / No**
• Did you receive, sell, send, exchange or otherwise acquire interest in any virtual currency? **Yes / No**
• Alimony Paid: _____ Recipient's SSN: _____ Date Divorced:_____
• Did any of your income include Overtime Pay or Tips? If so, provide us with your last paystub
• Teaching expenses (includes K-12 teachers, instructors, counselors, principals or aides): $_____
• Name of the school where you taught: _____
• Student Loan Interest Paid: $_____

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

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

• We need Form 1098-T from the university if anyone in your household incurred college expenses.

• 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 following:

• Original price paid for the house you sold: _____ Date it was originally purchased: _____

• Amount spent on major improvements during ownership: _____ We also need the Closing statement.

• Did you sell any other real estate? If so, we need the details and closing statement.

• Did you refinance or obtain a new mortgage? If so, please send us the closing statement.

•Did you contribute to a Missouri or Kansas First Time Home Buyer Savings acct? If so, how much? _____

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

• Amount paid for Health Ins. Prem. outside of your work plan. (medicare supp., etc.): $_____

• Amount paid for Long Term Care Insurance premiums. $_____

• Amount of IRA Contributions (separate from work plan): _____ Type of IRA: _____

• Amount of Spouse IRA Contribution: _____ Type of IRA: _____

• Are you interested in making an additional IRA contribution before tax day? **Yes / No**

• Did you make any Roth IRA conversions? **Yes / No**

• Did you withdraw money from a retirement plan or move your account from one broker to another? **Yes / No**

• Did you max out your **HSA** contribution? If not, are you interested in making an **additional contribution** to reduce your tax liability?

• Did you withdraw money from a Health Savings Acct. (HSA) or use it to pay medical expenses? If so, we need your Form 1099-SA.

• Did you contribute to an ABLE acct (Achieving a Better Life Experience) for qualified disability expenses?

• Have you had any tax credits disallowed by the IRS such as Earned income credit, Child tax credit or College tax credits? **Yes / No**

• Did you physically work or live within the City of KCMO during the year? **Yes / No**

• Were KCMO city taxes withheld from your paycheck while you worked remotely outside of the city of KCMO? **Yes / No**

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• Would you like to receive the finished copy of your return via email or as a paper copy? **E-Mail / Paper**

• Are you currently working with an investment advisor? If so, please provide their name and the firm they work with. _____

• Would you like us to connect you with a financial advisor? **Yes / No**

• Did you make estimated tax payments to the Fed or any state? If so, enter the dates and amounts below.

Federal

Payment #	Amount due	Date paid	Amount paid (not including credit card fee)	Overpayment Credit 2024 applied
1				
2				
3				
4				

State(s)

Payment #	Amount due	Date paid	Amount paid (not including credit card fee)	Overpayment Credit 2024 applied
1				
2				
3				
4				

Bank name: _____ Routing #:_____ Acct #:_____

The IRS no longer issues refund checks. Tax refunds will be only issued via direct deposit.