



# Wildhorse Tax Service, LLC

Voice: (913) 904 – 0447

Fax: (913) 815 – 1257

Email: [info@wildhorsetaxservice.com](mailto: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- Amount withdrawn or transferred (1099-R)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- Amount contributed to or withdrawn from College Savings Acct.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: \_\_\_\_\_



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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(separate from work plan): \_\_\_\_\_ 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? \_\_\_\_\_