



Wildhorse Tax Service, LLC

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Personal Info

- Government issued ID (Driver's lic., Passport, etc)
- Prior year's tax return
- 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 (1099B 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- Amount withdrawn or transferred (1099-R)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- Amount contributed to or withdrawn from College Savings Acct.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)