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- ☐ Amount withdrawn or transferred (1099-R)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- ☐ Amount contributed to or withdrawn from College Savings Acct.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

Did you purchase an electric vehicle? **Yes / No** We will need the sales receipt including the VIN.

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: _____

Please provide us with the closing statement from the sale.

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 brokerage 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 issued via direct deposit.