Wildhorse Tax Service, LLC
Voice: (913) 904 – 0447
Fax: (913) 815 – 1257
Email: info@wildhorsetaxservice.com

Upload the following to the portal

- ☐ Completed Client Information form (**attached**)
- ☐ Copy of your driver's license(s)
- ☐ W-2 from wages or gambling income
- ☐ Any Form 1099 (typically from a bank or broker, self-employment, unemployment, or social security)
- ☐ Any Form 1098 (mortgage interest, college tuition or student loan interest paid)
- ☐ Form 1095-A (**ONLY** if you had health insurance through the healthcare exchange.)
- ☐ Form K-1 (from interest in a Partnership, S-Corporation or Trust)
- ☐ Completed Business Income/Expense and or Rental Income/Expense worksheets if applicable (The worksheets can be found on the Forms page of our website.)
- ☐ The HUD statement (two summary pages from the closing if you refinanced your mortgage or purchase/sold a home)
- ☐ Prior year's tax return (**ONLY** if you are a new client)

Please **DO NOT** upload receipts such as personal property tax receipts, charity donations, etc.

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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? _____________