

WHEN DROPPING OFF YOUR PAPERWORK, PLEASE HELP US SPEED UP THE TIME PROCESS BY HAVING ALL TAX DOCUMENTS READY AND OUT OF THEIR ORIGINAL ENVELOPES. THANK YOU!

STIMULUS CHECK INFORMATION:

In March of 2021 the federal government issued a stimulus check (also referred to as the third stimulus) as emergency relief funds in response to the Covid-19 pandemic. This stimulus was in the amount of \$1,400 per person on your tax return and tax-payers received these funds between March and May of 2021. If you DID NOT receive this stimulus, and believe you may be entitled to it (income guidelines can be found on our website), you may be eligible to claim it on this year's tax return. If you only received a portion of the stimulus and believe you are entitled to receive more, due to adding a new dependent in 2021, write the exact amount you received.

NOTE: IF THIS SECTION IS LEFT BLANK, WE WILL ASSUME YOU RECEIVED THE EXACT AMOUNT YOU WERE ENTITLED TO AND NO FURTHER ACTION WILL BE TAKEN. IF YOU WRITE DOWN THE INCORRECT AMOUNT YOU RECEIVED, IT WILL DELAY YOUR REFUND WITH THE IRS.

Please mark the box that applies to you & fill in the amount you received:

- I did not receive a stimulus check in 2021*
- I received my full stimulus check in 2021*
- I received a portion of the stimulus in the amount of : \$_____*

3) Dependents: List the names of ONLY the dependents you can claim & check the box next to their name if they are a full time college student.

Name:	Student:	Relationship: (only if new)	SSN: (only if new)	DOB: (only if new)
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			

ADVANCED CHILD TAX CREDIT:

If you opted to receive the advanced child tax credit between the months of July- December 2021, the IRS issued you a letter with the exact amount you received. We need you to enclose a copy of this letter. If you did not receive it, please go back in your records to calculate the exact amount you received and list it here. We highly recommend that you visit the IRS website to request a copy of this letter, because if you provide us with the incorrect amount of advanced child tax credit payments, it can delay your refund significantly.

I received the advanced child tax credit in the amount of: \$_____

4) Your Income Tax Situation: Select all that apply to you or your spouse.

Do you rent your home or own your home? Rent Own

Income Sources:

- W2 Income - List # of W2 forms: _____
- Unemployment
- Social Security Income
- Retirement/ Pension
- Interest Income
- Dividends
- Stock Sales
- Self Employment Income/ 1099-NEC (Be sure to include a list of expenses to help decrease your Self Employment Tax)
- Rental Property
- Virtual Currency
- Gambling winnings of \$600 or more

Household / Dependents:

- College tuition **(must provide 1098-T form)**
- Paid student loan interest **(1098-E form)**
- Enrolled in a health insurance plan through Covered CA or the exchange market place **(must provide 1095-A form)**
- Paid for child care/ daycare **(if you checked this box, and did not enclose a form with information, please list the amount paid, name, address, and EIN or SSN of the provider you use under the comment section)**

Miscellaneous:

- Sold or purchased a home (must provide final closing cost statement)
- Paid or received alimony prior to Jan. 1, 2020

We will contact you if we have any questions or suggestions regarding your income tax situation. If you would like a phone call to discuss specific matters while we are working on your return, please briefly list your questions or concerns below, as well as your phone number and the best time to call.

Phone # _____ Best Time to Call: _____

Comments, questions, or notes you have for us:

Your Signature: _____

Date: _____

By signing, you recognize that you have thoroughly read through this form and if items were left off after your final tax return has been completed, you may be subject to a re-print fee.

Thank you for your continued business! We greatly appreciate you and hope you have a wonderful and healthy year.