

2021 Questionnaire

Client Name _____

- Received 3/2021 Stimulus Payment ____ yes ____ no
 - Provide IRS Notice 1444-C
 - Amount received \$1,400/\$2,800/\$1,400 _____
- Received Advanced Child Tax Credits ____ yes ____ no
 - Provide IRS Letter 6419
 - Amount received \$3,000/\$3,600 per child
- Unemployment ____ yes ____ no
 - Illinois ____ Indiana ____
- Charitable Contributions
 - Page 1 up to \$600 _____
- DD Information – Bank _____
 - Routing Number _____
 - Account Number _____
 - ____ Checking ____ Savings
- Miscellaneous Notes
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____