

# Pandemic Relief Form

This Pandemic Relief Form helps organize your pandemic-related documentation and information. This form is pertinent to all personal and business tax returns. The form is split into two sections: individuals and businesses. Please provide additional "unique" information in the "other notes" section on the back. As mentioned below, it is imperative that Letters 1444-C and 6419 are included with your documentation.

## Individuals

### ECONOMIC IMPACT PAYMENT # 3 (STIMULUS CHECK # 3)

In 2021, taxpayers and qualifying dependents were entitled to receive a third "Economic Impact Payment" (stimulus check) of up to \$1,400 per taxpayer and \$1,400 per qualifying dependent. The EIP was distributed via check, debit card, or direct deposit into your bank account. The EIP was calculated using information reported on your 2019 or 2020 Form 1040. Therefore, if you are entitled to additional payment as a result of the birth of a child, change in qualifying dependents, or change of income, that will be calculated on your 2021 Form 1040. Please provide the total amount received by you and, if applicable, your spouse and qualifying dependent(s) in 2021:

Total amount received (The exact amount is necessary. Please verify with your bank statement) \$ \_\_\_\_\_

**\*\*IMPORTANT: In January 2022, the Internal Revenue Service (IRS) is mailing (mailed) Letter 1444-C summarizing this information. You must include this letter with your tax documents.**

### ADVANCE CHILD TAX CREDIT PAYMENT(S)

In accordance with the American Rescue Plan (ARP), taxpayers were eligible to receive an "Advance Child Tax Credit" (ACTC) for each qualifying child up to age seventeen at the end of 2021. Each child under the age of six at the end of 2021 was eligible to receive up to \$300 per month between July and December. Each child between the ages of six and seventeen at the end of 2021 was eligible to receive up to \$250 per month between July and December. The ACTC is calculated using information reported on your 2019 or 2020 Form 1040. Therefore, if you are entitled to an additional ACTC due to the birth of a child or change of income, that will be calculated on your 2021 Form 1040. In certain circumstances, repayment of all or part of the ACTC will be calculated on your 2021 Form 1040. Please list the total amount received each month for ACTC. The exact amount is necessary. Please use your bank statements to verify.

July \$ \_\_\_\_\_ August \$ \_\_\_\_\_ September \$ \_\_\_\_\_ October \$ \_\_\_\_\_ November \$ \_\_\_\_\_ December \$ \_\_\_\_\_

**\*\*IMPORTANT: In January 2022, the IRS is mailing (mailed) Letter 6419 summarizing your ACTC(s). You must include this form with your tax documents. In June 2021, the Internal Revenue Service mailed Letter 6416 summarizing the expected amount of your ACTC(s). If you retained this letter, please enclose with your income tax documents.**

In June 2021, a new website (Child Tax Credit Update Portal) was created for taxpayers to make changes to the ACTC (including an option to opt out). Did you visit the website to make changes to your online account? Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, provide details about the changes made: \_\_\_\_\_

### CHARITABLE CONTRIBUTIONS

Did you make a donation to a charitable organization in 2021? Yes \_\_\_\_\_ No \_\_\_\_\_

There is an "above the line" deduction for contributions to charity in 2021. Please provide the amount and organization name for all donations made in 2021 on page 4 of the enclosed tax data organizer under "Charitable Contributions."

### CHILD & DEPENDENT CARE CREDIT

Did you pay for child and dependent care related expenses in 2021? Yes \_\_\_\_\_ No \_\_\_\_\_

The Child & Dependent Care Credit (CDCC) was increased, and in some cases, made refundable by the ARP. CDCC is a deduction for care related expenses like daycare, preschool, and day camp for dependents under age 13, qualifying disabled dependents, or a spouse who was not mentally or physically able to care for themselves. Please provide information related to CDCC on page 4 of the enclosed tax data organizer under "Childcare Information."

**STUDENT LOAN DEBT**

Were your student loan debt payments suspended for all of 2021? Yes \_\_\_\_\_ No \_\_\_\_\_

**RETIREMENT DISTRIBUTIONS**

Did you elect to tax your retirement distributions over three years (election made in tax year 2020)? Yes \_\_\_\_\_ No \_\_\_\_\_  
If you are a new client, please provide prior year Form 1040 and corresponding Form 8915-E.

***Businesses***

**LOANS, GRANTS, & CREDITS**

Businesses were financially impacted by the ongoing pandemic. As a result, several new loan, grant, and credit programs were established in 2021.

In 2021, did you apply for a pandemic-related business loan, grant, or employee credit? Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, please complete all of the following that apply. Please provide all corresponding paperwork.

**2020 (First Round) Payroll Protection Program Loan (PPP Loan):**

Loan Amount \$ \_\_\_\_\_ Lender Name \_\_\_\_\_  
Loan Interest paid in 2021 \$ \_\_\_\_\_ Applied for Forgiveness? Yes \_\_\_\_\_ No \_\_\_\_\_ Forgiven? Yes \_\_\_\_\_ No \_\_\_\_\_  
Notes: \_\_\_\_\_

**2021 (Second Round) Payroll Protection Program Loan (PPP Loan):**

Loan Amount \$ \_\_\_\_\_ Lender Name \_\_\_\_\_  
Loan Interest paid in 2021 \$ \_\_\_\_\_ Applied for Forgiveness? Yes \_\_\_\_\_ No \_\_\_\_\_ Forgiven? Yes \_\_\_\_\_ No \_\_\_\_\_  
Notes: \_\_\_\_\_

**2021 Economic Injury Disaster Advance Loan (EIDL Advance Loan):** Loan Amount \$ \_\_\_\_\_  
Lender Name \_\_\_\_\_ Loan Interest paid in 2021 \$ \_\_\_\_\_  
Notes: \_\_\_\_\_

**2021 State Grant:** Grant Amount \$ \_\_\_\_\_ Lender Name \_\_\_\_\_  
Notes: \_\_\_\_\_

**2021 County Grant:** Grant Amount \$ \_\_\_\_\_ Lender Name \_\_\_\_\_  
Notes: \_\_\_\_\_

**Employee Retention Credit:** Credit Calculated \$ \_\_\_\_\_ Amount Refunded (if applicable) \$ \_\_\_\_\_  
Notes: \_\_\_\_\_

**OTHER NOTES**

Please provide any additional questions, concerns, or information relevant to your personal or business income tax return(s) and / or the pandemic.

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