



## 2021 Advance Child Tax Credit Questionnaire

Name: \_\_\_\_\_

- **In lieu of this worksheet, please provide IRS Letter 6419 to me if you have it in your possession. It should have been mailed to you by the IRS in Dec. or Jan. to confirm the amount of Advance Child Tax Credit ("CTC") issued.**
- The 2021 Advance CTC was an *advance tax credit* for your 2021 tax return. The monthly payments were based on dependent data from your 2019 or 2020 tax return, depending on which year the IRS had available to them for reference.
- If you were eligible, but for some reason did not receive the advance payments, you will now receive them as a refundable tax credit on your 2021 tax return.
- If you did not receive a full or partial payment due to income limits, that situation may continue to disqualify you for 2021.
- If you were previously ineligible due to income limits, and your income *decreased* in 2021, you may now be eligible to receive a full or partial credit on your 2021 taxes.
- If your income *increased* in 2021 to the point where you would have been ineligible, you may have to pay back any funds received to date.
- The Advance CTC payments are **non-taxable income**. Do not include with any income tallies.
- The 6 monthly full amounts paid were \$300 (\$1,800 total) for each dependent child aged 5 years or younger (as of Dec. 31, 2021) as listed on your 2019 or 2020 tax return; or \$250 (\$1,500 total) for each dependent child aged 6-17 years (as of Dec. 31, 2021) as listed on your 2019 or 2020 tax return.
- If your child was born in 2021, you will receive the total CTC of \$3,600 as a refundable credit on your 2021 tax return, unless you opted in to receive some or all of the monthly advance payments during the year.

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1) Did you receive the full Advance CTC of \$300 per month (\$1,800 total) for each dependent child age 5 years or younger (as of Dec. 31, 2021)? Yes\_\_\_ No\_\_\_  
If no, what is the *total* amount of the \$1,800 per child received? \$\_\_\_\_\_

2) Did you receive the full Advance CTC of \$250 per month (\$1,500 total) for each dependent child age 6-17 years (as of Dec. 31, 2021)? Yes\_\_\_ No\_\_\_  
If no, what is the *total* amount of the \$1,500 per child received? \$\_\_\_\_\_

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If you are not sure if or how much of the payments were received, **please review your bank deposit records** for the relevant period (July-Dec. 2021) to verify. If your data is incorrect, the IRS will be forced to reconcile everything after the return is filed, which could affect your 2021 tax liability, along with subsequent refunds or balances due. This reconciliation may also significantly delay the processing of your tax return, so it's best to be accurate from the get-go.

Maximum 2021 Adjusted Gross Income for full payments:

Single: \$75,000; Married Joint: \$150,000; Head of Household: \$112,500

Credit is reduced by \$50 for every \$1,000 over the income threshold.