



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

- In lieu of this worksheet, you should provide IRS Notice 1444-C or Letter 6475 to me if you have either in your possession. One or both should have been mailed to you by the IRS to confirm the amount of the 3rd round payment issued to you.
- The 2021 stimulus payment was an *advance tax credit* for your 2021 tax return. The payment was based on 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 March 2021 stimulus payment, you will now receive it as a refundable tax credit (i.e. "Recovery Rebate 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 do not have to pay back any funds received to date.
- The stimulus payment is **non-taxable income**. Do not include with any income tallies.

If you are not sure if or how much of the payment was received, **please review your bank deposit records** for the relevant period (March-April 2021) to verify. If your data regarding payment received or not received is incorrect, the IRS will reconcile everything after the return is filed, which would 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.

If this questionnaire, or one of the IRS notices, are not returned to me, I will assume that the 3rd round stimulus payment was received in full, and therefore no 2021 tax credit will be calculated.

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1) Did you (and if married, your *spouse*) receive the full amount of the **3rd round** stimulus payment of \$1,400 (\$2,800 if married)? Yes\_\_ No\_\_

If no, what amount of the \$1,400 (\$2,800) did you receive? \$\_\_\_\_\_

2) Did all eligible dependents receive the full amount of the **3rd round** stimulus payment of \$1,400 each? Yes\_\_ No\_\_

If no, what is the *total* amount of the \$1,400 per eligible dependent received? \$\_\_\_\_\_

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"Phaseout" Adjusted Gross Income ranges for eligibility, based on 2019 or 2020 tax return:

**Single:** Up to \$75,000 = Full / \$75,001 - \$80,000 = Partial / Over \$80,000 = Ineligible

**Married Joint:** Up to \$150,000 = Full / \$150,001 - \$160,000 = Partial / Over \$160,000 = Ineligible

**Head of Household:** Up to \$112,500 = Full / \$112,501 - \$120,000 = Partial / Over \$120,000 = Ineligible