



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

**Please read:**

- The 2020 stimulus payments were essentially designed as *advance tax credits* for your 2020 tax return. The payments were based on data from your 2019 tax return. (If you did not file a 2019 return, the IRS looked at your 2018 tax return.)
- If you were eligible, but did not receive the payments for some reason, you will now receive them as a refundable tax credit (i.e. "Recovery Rebate Credit") on your 2020 tax return.
- If you did not receive full or partial payments due to income limits, that situation may continue to disqualify you for 2020.
- If you were previously ineligible due to income limits, and your income *decreased* in 2020, you may now be eligible to receive a full or partial credit on your 2020 taxes.
- If your income *increased* in 2020 to the point where you would have been ineligible, or if your child has reached the age of 17, you do not have to pay back any funds received to date.
- The stimulus payments are **non-taxable income**. Do not include with any income tallies.
- Please provide IRS Notice 1444 to me if you still have it in your possession. This was mailed to you by the IRS to confirm the 1st round payment was issued.
- Rounds 1 and 2 full combined payments: Single = \$1,800 / Married = \$3,600 / Each child = \$1,100

If you are not sure if or how much of each payment was received, **please review your bank deposit records** for the relevant periods (April - July or Dec. - Jan.) to verify. If your data regarding payments received or not received is incorrect, the IRS will reconcile everything after the return is filed, which would affect your 2020 tax liability, along with subsequent refunds or balances due.

If this questionnaire is not returned to me, I will assume that both rounds of stimulus payments have been received in full, and therefore no 2020 tax credit will be calculated.

**Please answer the following:**

1) Did you (and if married, your spouse) receive the full amount of the **1st round** stimulus payment of \$1,200 (\$2,400 if married)? Yes\_\_ No\_\_

If no, what amount of the \$1,200 (\$2,400) did you receive? \$\_\_\_\_\_

2) Did you receive the full amount of \$500 of the **1st round** stimulus payment for each dependent child under age 17 listed on your 2019 (or 2018) tax return? Yes\_\_ No\_\_

If no, what is the *total* amount of the \$500 per child you received? \$\_\_\_\_\_

3) Have you, your spouse, and any eligible dependent children received the full amount of the recent **2nd round** stimulus payment of \$600 each? Yes\_\_ No\_\_

If no, what is the *total* amount of the \$600 per eligible person you received? \$\_\_\_\_\_