

## 2021 Additional Tax Info Questionnaire

### ECONOMIC STIMULUS PAYMENTS

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Did you receive the 3rd Economic Stimulus payment?

If yes, how much?

Taxpayer: \_\_\_\_\_

Spouse: \_\_\_\_\_

*Please provide documentation showing the payment amount or a print-out from your IRS Online Account which can be accessed at: [www.irs.gov/payments/your-online-account](http://www.irs.gov/payments/your-online-account)*

### ADVANCE CHILD TAX CREDIT PAYMENTS

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Did you receive pre-payments of the 2021 Child Tax Credit?

If yes, how much?

Taxpayer: \_\_\_\_\_

Spouse: \_\_\_\_\_

*If yes, please provide IRS Letter 6419 or a print-out from your IRS Online Account which can be accessed at: [www.irs.gov/payments/your-online-account](http://www.irs.gov/payments/your-online-account)*

### YEAR-END PAY STUB

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Have you included your last pay stub (12/31/21) for each job held in 2021?

Please include the final pay stub with your tax documentation.

### COVID-RELATED QUESTIONS

If you took a COVID-related pension distribution:

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Did you spread the income from a COVID-related distribution over 3 years (2020, 2021, 2022)?

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Did you plan on re-contributing any of this distribution before 12/31/2022?

**UNEMPLOYMENT COMPENSATION**

N/A YES NO

Did the Taxpayer or Spouse receive any Federal or State Unemployment benefits?

N/A YES NO

If yes, did you provide a copy of Form 1099-G. (You may need to log onto your State Unemployment account to download this tax form.)

**PAYCHECK PROTECTION PROGRAM (PPP) LOANS**

N/A YES NO

Did you apply for a PPP Loan IN 2021?

N/A YES NO

Were you approved?

Date? \_\_\_\_\_

How much? \_\_\_\_\_

N/A YES NO

Have you applied for forgiveness of the loan?

N/A YES NO

Was the forgiveness approved?

How much was forgiven? \_\_\_\_\_

N/A YES NO

Did you receive any COVID-related Grants in 2021?

List all Grants received and the amount:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

N/A YES NO

Did you receive any SBA COVID Loans?

List all Loans and the amount:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NJ BEST 529 PLAN CONTRIBUTION**

N/A YES NO

Did you contribute to a NJ Best 529 Plan?

Date? \_\_\_\_\_

How much? \_\_\_\_\_

**HURRICANE IDA DAMAGES**

N/A YES NO

Did you have any damages from Hurricane Ida?

Provide details:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Amount of Insurance Payout: \_\_\_\_\_

Out-of-Pocket Expenses: \_\_\_\_\_

**NJ WORKING MIDDLE-CLASS REBATE**

N/A YES NO

Did you receive the NJ Working Middle-Class Rebate?

Date? \_\_\_\_\_

How much? \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_