**Dear Client,**

**In order to complete your returns in an accurate and timely manner, we are requesting that you print and send the following information with your returns, whether mailed, dropped off, emailed, or uploaded:**

**STIMULUS PAYMENT RECEIVED *MARCH 2021 OR AFTER***

**AMOUNT \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ NO PAYMENT RECEIVED \_\_\_\_\_**

Verify using Letter 6475, IRS online system, or your bank records.

**UNEMPLOYMENT COMPENSATION RECEIVED YES \_\_\_\_ NO \_\_\_\_\_**

(If yes, make sure 1099G Included in documents)

**RECEIVED, SOLD, TRADED, EXCHANGED CRYPTOCURRENCY IN 2021**

**YES \_\_\_\_ NO \_\_\_\_\_**

**CHARITABLE CONTRIBUTIONS, IF ANY**

**AMOUNT BY CASH OR CHECK \_\_\_\_\_\_\_\_\_\_\_\_**

**VALUE OF GOODS DONATED \_\_\_\_\_\_\_\_\_\_\_\_**

**ENERGY EFFICIENT HOME IMPROVEMENTS FOR YOUR MAIN HOME**

**SOLAR PANELS, WINDOWS, EXTERIOR DOORS, WATER HEATER, A/C, HEATING SYSTEM**

**YES \_\_\_\_\_ NO \_\_\_\_\_\_\_**

(IF YES, INCLUDE RECEIPTS THAT SHOW HIGH EFFICIENCY RATINGS)

**ADVANCE CHILD TAX CREDIT PAYMENTS RECEIVED FOR 2021 \***

**(IF APPLICABLE)**

**AMOUNT RECEIVED \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ NONE RECEIVED \_\_\_\_\_\_\_\_\_**

**BANK INFORMATION - FOR DIRECT DEPOSIT/ DIRECT DEBIT**

**PLEASE USE SAME BANK ACCT AS LAST YEAR WITH THESE LAST FOUR DIGITS \_\_\_\_\_\_\_\_\_\_\_\_ (WE WILL CONFIRM)**

**PLEASE USE NEW ACCOUNT; COPY OF VOIDED CHECK ATTACHED \_\_\_\_**

*Please print this form and send with your documents or download from our website.*

*\*Please check our website for the IRS Update under “News” “Child Tax Credit” which will describe in detail how you can access this information. Inaccurate information for this item, as well as the Stimulus payment, will result in significant delays in processing your return and refund.*

Thanks! Andy, Roberta, Julie, Donna, Emily, Marianne