

CLIENT SUPPORTING STATEMENTS



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Value. Quality & Commitment

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STIMULUS CHECK STATEMENT

In 2020 and 2021 most taxpayers received one or more Federal "Stimulus Check" or "Economic Impact Payment" from the Federal government for the 2020 tax year. As your tax preparer we are required to reconcile your payment to determine if you are owed any additional payment, but it is difficult for us to determine any amount you may have received.

Please attach IRS Notice 1444 showing the amount of the check(s) you received and check the applicable line below. If you did not receive this notice or have misplaced it, please complete the applicable information below. **The IRS will impose accuracy related penalties for incorrectly reported Stimulus amounts.**

I received and have attached a copy of Form 1444

I did not receive a stimulus check

I do not have a copy of Form 1444, but I did receive a stimulus check(s) in the amount of \$ _____ and \$ _____.

Signature

Printed Name

Date

RETIREMENT DISTRIBUTIONS STATEMENT

In 2020 taxpayers were allowed to take an early distribution for COVID-19 reasons without having to pay the 10% penalty. Additionally, taxpayers may elect to repay the distribution ratably within 3 years from the date of the distribution and avoid paying any Federal income tax on the repaid amounts.

Please check the boxes below to indicate how you are electing to have your early retirement distribution treated for Federal tax purposes.

I have taken an early distribution in the amount of \$ _____ and will **repay the entire amount** ratably over three years.

\$ _____ Year 1 repayment \$ _____ Year 2 repayment \$ _____ Year 3 repayment

_____ *Payment 1 date* _____ *Payment 2 date* _____ *Payment 3 date*

I have taken an early distribution in the amount of \$ _____ and will **repay part of the amount** ratably over three years.

\$ _____ Year 1 repayment \$ _____ Year 2 repayment \$ _____ Year 3 repayment

_____ *Payment 1 date* _____ *Payment 2 date* _____ *Payment 3 date*

I have taken an early distribution in the amount of \$ _____ and will **not repay any of it**.

Signature

Printed Name

Date