

2021 SUPPLEMENTAL TAX QUESTIONNAIRE

ADVANCED CHILD TAX CREDIT

- Did you receive Advanced Child Tax Credit Payments in 2021? **YES** _____ **NO** _____
 - **If YES**, please provide the Internal Revenue Service **Letter 6419** sent to you in January 2022.
 - If Letter 6419 was **not** received, please confirm the total amount of 2021 Advanced Child Tax Credit payments you received below. You can also visit www.irs.gov/credits-deductions/child-tax-credit-update-portal to check your advance payments. Click on "Manage Advance Payments"
Note: If you do not have an existing IRS username, have your photo identification ready to set up your account

TOTAL RECEIVED \$ _____

THIRD ECONOMIC IMPACT STIMULUS PAYMENTS

- Did you or any of your dependents receive the 3rd Economic Impact Payments (i.e. Stimulus Payments) - sent approximately in April 2021? **YES** _____ **NO** _____
 - **If YES**, please provide the total amount of 2021 Economic Impact Payments received in 2021 (the maximum households could have received is \$1,400 per eligible individual)

TOTAL RECEIVED \$ _____

VIRTUAL CURRENCY

- At any time during 2021, did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currency? **YES** _____ **NO** _____
 - **If YES**, was the virtual currency held in a foreign exchange? **YES** _____ **NO** _____

FOREIGN ACCOUNTS

- Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account located in a foreign country? **YES** _____ **NO** _____
- Did you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity? **YES** _____ **NO** _____
 - **If YES**, please provide details _____

Taxpayer Signature: _____

Date: _____

Spouse Signature: _____

Date: _____

For Office Use Only: Client Code: _____