

12. Would you like your Tax Preparation bill taken out of your refund? ****Please note the bank charges \$58.95 on top of your preparation fee.** If you do not get a refund or if you owe back taxes, you will not qualify. If the bank does not approve, **YOU** will be responsible for the tax preparation fee.

Did you have any of the following **Residential Energy Credits**?

- Qualified Solar Electric, Water, Wind or Geothermal property costs
- Insulation
- Exterior doors or windows
- Metal or asphalt roof installed (Not patched)
- Natural gas, propane or oil furnace or hot water boiler
- Advanced main air circulating fan

If so, please include receipts for said purchases or installations.

COVID SPECIFIC INFORMATION:

1. Was the taxpayer or spouse a member of the **U.S. Armed Forces** at any time during 2020?
2. Enter the amount, if any, of the **first economic stimulus payment** you received (before offset for any past-due child support payment). This was generally received in Summer 2020.
3. Enter the amount, if any, of the **second economic stimulus payment** you received (before offset for any past-due child support payment). This was generally received in December 2020 or January 2021.
4. Have you included all 1099-Gs for anyone who collected **Unemployment**?
5. Are any **Retirement distributions** Covid-19 related?
 - a. If so, include 1099-R & What **date** was the earliest Covid related distribution taken out?
 - b. Have you **repaid** any of it? If so, how much?
6. If you are **self-employed**, did you receive any **Covid-19 related Grants or Loans**? If so, include the verification paperwork with amount received and dates.

