

# Veritas CPA Group LLC

## COVID-19 Questionnaire for 2020

Due to the COVID-19 pandemic there are many new and different tax situations and scenarios.  
Please answer the following questions regarding the 2020 tax year.

- | Yes                      | No                       |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1) Did you receive the first Economic Impact Payment (EIP Stimulus / Spring of 2020)?<br>If yes, provide Notice 1444 received from the IRS, or a copy of your bank deposit.<br>If you do not have the notice, how much did you receive? \$_____ |
| <input type="checkbox"/> | <input type="checkbox"/> | 2) Did you receive the second Economic Impact Payment (EIP Stimulus / January 2021)?<br>If yes, provide Notice 1444 received from the IRS, or a copy of your bank deposit.<br>If you do not have the notice, how much did you receive? \$_____  |
| <input type="checkbox"/> | <input type="checkbox"/> | 3) Did you make any withdrawals from a qualified retirement plan (IRA, 401K, etc.)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | If yes, were any withdrawals due to a Federally declared disaster OR COVID-19?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you repay any of the monies distributed in 2020?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 4) Did you receive a Paycheck Protection Program loan (PPP)?  |
| <input type="checkbox"/> | <input type="checkbox"/> | If yes, have you already applied for PPP loan forgiveness?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 5) Are you a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 6) Did you pay emergency leave sick pay to an employee?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 7) Did you pay emergency family leave wages to an employee?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 8) Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the 2020 tax year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 9) If you are self-employed, were you unable to perform your self-employed activities due to Coronavirus related care you needed?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 10) If you are self-employed, were you unable to perform your self-employed activities due to Coronavirus related care you provided to your son or daughter under the age of 18?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 11) If you are self-employed, were you unable to perform your self-employed activities due to Coronavirus related care you provided to another?   |

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Print name

Signature

Date