

**1. Organizers are in your portal under the folder Client Organizers. If you can't get into your portal, email us and we can send an organizer via email.**

**If you ABSOLUTELY need a printed copy, please request that in your email.**

**2. Parents are flooded with paperwork every single day of the year. But this year, they absolutely want to keep track of one key letter — Letter 6419, ( see copy of letter below ) to be sent to you by none other than the Internal Revenue Service.**

Do not throw this letter away. Keep it with all your other important tax paperwork, including your W-2s.

Repeat, keep this letter to do your taxes. ( you could get two letters ( one for the taxpayer and one for your spouse )

The IRS said in early January that it started issuing these letters in December to **those who received advance child tax credit money last year.** It's important to keep an eye out for this information.

### **3. Economic Impact Payments and claiming the Recovery Rebate Credit**

Individuals who didn't qualify for the third Economic Impact Payment or did not receive the full amount may be eligible for the Recovery Rebate Credit based on their 2021 tax information. They'll need to file a 2021 tax return, even if they don't usually file, to claim the credit.

*Individuals will also need the amount of their third Economic Impact Payment and any Plus-Up Payments received to calculate their correct 2021 Recovery Rebate Credit amount when they file their tax return.*

*Ensuring they use the correct payment amounts will help them avoid a processing delay that may slow their refund.*

In early 2022, the IRS will send **Letter 6475** that contains the total amount of the third Economic Impact Payment and any Plus-Up Payments received. People should keep this and any other IRS letters about their stimulus payments with other tax records.

Individuals can also log in to their IRS.gov Online Account to securely access their Economic Impact Payment amounts.

See [IRS.gov/rrc](https://www.irs.gov/rrc) for more information.

**Please make sure we receive this letter when giving us your tax information.**

## Gather and organize your tax records

Organized tax records make preparing a complete and accurate tax return easier. It helps you avoid errors that lead to processing delays that slow your refund and may also help you find overlooked deductions or credits.

Wait to file until you have your tax records including:

- [Forms W-2](#) from your employer(s)
- Forms 1099 from banks, issuing agencies and other payers including [unemployment compensation](#), [dividends](#), distributions from a [pension, annuity or retirement plan](#)
- [Form 1099-K](#), [1099-MISC](#), W-2 or other income statement if you worked in the [gig economy](#)
- [Form 1099-INT](#) if you were paid [interest](#)
- Other income documents and records of [virtual currency](#) transactions
- Form 1095-A, Health Insurance Marketplace Statement, to [reconcile](#) advance Premium Tax Credits for Marketplace coverage
- Letter 6419, 2021 Total Advance Child Tax Credit Payments to [reconcile](#) your advance Child Tax Credit payments
- Letter 6475, Your 2021 Economic Impact Payment, to determine whether you're eligible to [claim](#) the Recovery Rebate Credit

Notify the IRS if your [address changes](#) and notify the [Social Security Administration](#) of a legal name change.

Remember, most income is [taxable](#). This includes:

- [unemployment income](#),
- [refund interest](#),
- income from the [gig economy](#), and
- [virtual currencies](#).