



# EMPLOYEE RETENTION TAX CREDIT SURVEY

The Estimate you will be given is a “rough” estimate based on the data provided in the client survey. It does not prove or attempt to prove that an employer qualifies for a recovery. **A field estimate will be provided 24-48 hours after receipt of survey.**

**Qualification Based upon Reduction in Gross Receipts:** An employer is eligible based on reduction of Gross Receipts 2020: 50% or greater drop in Gross Receipts vs the same quarter in 2019 2021: 20% or greater drop in Gross Receipts vs the same quarter in 2019.

## COMPANY OVERVIEW & CONTACT INFORMATION

Legal Entity Name \_\_\_\_\_ DBA (if applicable) \_\_\_\_\_

Owner/President/CEO Name \_\_\_\_\_

Owner/President/CEO Title \_\_\_\_\_

Legal Entity Address \_\_\_\_\_

Contact Person & Title (if different from above) \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

What type of entity is the business?

- C Corp     S Corp     LLC     Partnership     Sole Proprietor     Non-Profit

Agent Name Who Referred You \_\_\_\_\_

## EMPLOYEE INFORMATION

Average Number of Employees Per Quarter (Q1 – Q4 2019) \_\_\_\_\_

*This information can be found in the quarterly wage report.*

	Number of Employees	Quarterly Payroll Amount
Q2 – 2020		
Q3 – 2020		
Q4 – 2020		
Q1 – 2021		
Q2 – 2021		
Q3 – 2021		

What are the owner's wages paid per quarter to business owners of 50% or greater? \_\_\_\_\_

NOTE: 1) Must be included in the payroll summary.

2) If business owners are 50/50, add both wages together below.

	Owner's Wages Paid
Q2 - 2020	
Q3 - 2020	
Q4 - 2020	
Q1 - 2021	
Q2 - 2021	
Q3 - 2021	

## WAGES EARMARKED FOR PPP FORGIVENESS

	Amount Received	Amount Toward Wages
1st Round - PPP		
2nd Round -PPP		

What cover period was used when applying for forgiveness of the **1st PPP Loan**?  8 Weeks  24 Weeks

Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

What cover period was used when applying for forgiveness of the **2nd PPP Loan**?  8 Weeks  24 Weeks

Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

Was the business deemed **non-essential** during full or partial government shutdown?  YES  NO

Was the business deemed **essential**, but had trouble sourcing equipment, supplies, etc?  YES  NO

## OTHER CONSIDERATIONS

Experienced a full shutdown  YES  NO

Experienced a partial shutdown  YES  NO

Experienced interrupted operations  YES  NO

Experienced supply chain interruptions  YES  NO

Inability to access equipment  YES  NO

Limited capacity to operate  YES  NO

Inability to work with your vendors  YES  NO

Reduction in services or goods offered to your customers  YES  NO

Cut down in your hours of operation  YES  NO

Shifted hours to increase sanitation of your facility  YES  NO