



## HowardSimon Payroll 2021 Employee Retention Credit

Company Information	
Company Name	Company Code
<input type="text"/>	<input type="text"/>

Although the Employee Retention Credits are claimed through payroll tax returns, they contain a wide variety of complex rules and requirements that go well beyond the scope of payroll data. These include eligibility requirements, ownership relationships, PPP loans and how forgiveness applications were made, and more. Please thoroughly review the IRS eligibility requirements and the definition of Qualified Wages before completing this form.

- [Employee Retention Credit | Internal Revenue Service \(irs.gov\)](#)
- [FAQs: Employee Retention Credit under the CARES Act | Internal Revenue Service \(irs.gov\)](#)

**Please Check All That Apply:**

- I **DID NOT** receive a PPP loan in 2021, and do not intend to.
- I received PPP Funds in 2021 and **DID** use all of the funds on qualified expenses in 2021.
- I received PPP Funds in 2021 and **DID NOT** yet use all of the funds on qualified expenses in 2021.

*NOTE: HowardSimon does not have the details of your PPP loan forgiveness and cannot calculate the ERC without this knowledge. You must complete the [2021 ERC Request spreadsheet](#) if you had a 2021 PPP loan.*

**By signing below, I acknowledge and Confirm:**

1. I am an officer of the entity requesting the credits.
2. **Guidance is evolving and as of the publishing of this form (March 31, 2021) there are many questions about how the PPP forgiveness interacts with the ERC Credits. I am aware of this and I am assuming all risk associated with moving forward prior to guidance being finalized, including the risk of failing to maximize credits and/or penalties and interest that maybe assessed.**
3. *HowardSimon* Payroll does not have the information required and does not have sufficient knowledge of my business operations to determine my eligibility for this credit.
4. I have reviewed the IRS Eligibility Requirements, and I confirm that I am eligible for the credits I have requested, and I authorize *HowardSimon* Payroll to process the credits I requested on my behalf.
5. I have completed the Retention Credit Worksheet and confirm that the qualified wages I provided are true and accurate. [2021 ERC Request spreadsheet](#).

Client Approval			
Print Name	<input type="text"/>	Title	<input type="text"/>
Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>