



We help you
secure credit
**where credit
is due.**

Prepared for
Sample Inc.

Prepared by
ERTC Funding



Thank you for trusting ERTC Funding with the critical task of redeeming your ERC Refund. Receiving this packet means that your ERC eligibility analysis and computations are complete!

This report includes a complete breakdown of your ERC eligibility analysis and computations, which are based on the information you have provided. Please carefully review each document, and don't hesitate to reach out with any questions or concerns.

That the past few years have been difficult and stressful is an understatement. This makes receiving your ERC Refund all the more important! Our goal has been, and continues to be, to make the process as straightforward as possible while working within the complex set of rules issued by the IRS, so that you can complete the process of obtaining your ERC Refund stress-free.



Expert ERC preparation services to help you compliantly maximize your ERC Refund!

Let's start rebuilding together!

ERTC Funding



Closing Packet Contents Include:



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Consulting
Agreement



02

Certification
Letter



03

Eligibility
Report



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ERC
Computation



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Memorandum



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941-X
Forms



Consulting Agreement

The consulting agreement between your business and ERTC Funding outlines the individual responsibilities and commitments agreed to by both parties.

Please keep this agreement in a safe place for your record-keeping.

[Click here to download →](#)



Certification Letter

The Certification Letter contains information you have certified to ERTC Funding, which we relied upon when preparing your ERC Refund.

As a host of variables can affect your ERC Refund, it is essential to ensure the accuracy and validity of the information compiled in this Letter.

[Click here to download →](#)



Eligibility Report

We've compiled the "how," "why," and "who" behind your ERC Refund, all in one condensed and audit-ready report.

What does your controlled group look like? Are you considered a large or small employer? Did you qualify due to experiencing a Significant Decline in Gross Receipts (SDGR) or by suffering from a Full or Partial Suspension of Operations (FPSO) due to Covid-19 government orders? Which employees are eligible for the ERC? What role did PPP play, and how much money did our ERC optimizer tool save you? All this information is compiled into an easy-to-read report, which is the #1 thing you would provide the IRS with if audited.

[Click here to download →](#)



ERC Computation/ Wages Allocation Report

This extensive spreadsheet details exactly where each payroll dollar was allocated.

This report will help you sleep peacefully, knowing that every dollar you receive has been accounted for, whether it's PPP, ERC, or FFRCA. All the payroll numbers that play a role are listed in this spreadsheet. Think of this as the data set behind your eligibility report!

[Click here to download →](#)



Legal Memorandum

Determining eligibility to claim the ERC based on government restrictions can be quite tricky. That is why we have a powerhouse law firm - [Winston & Strawn LLP](#) - provide a legal memorandum extensively detailing the analysis and conclusions regarding your qualified periods, essentially signing off on your ERC claim.

Please keep this in your records, as it can prove extremely valuable down the road if any agencies are to inquire as to how you determined eligibility under the FPSO qualifier.

[Click here to download →](#)



941-X Forms

To wrap up your ERC Refund Claim: Please review, wet sign, and date these (already prepared) Forms 941-X. Once signed, you can either upload them to your secure client portal, or alternatively, you can reply directly to this email with copies of them - and we will take it from there!

The Form 941-X is an amendment to your (already filed) Form 941, and it is the form used to claim the ERC Refund. Please let your payroll provider, as well as your CPA, know about these amendments.

[Click here to download →](#)

Love our final deliverable?

We'd greatly appreciate if you left a Google review so others can be assured that they are in excellent hands!

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