



**COMMON  
WEALTH  
CHARLOTTE**

uncommon financial solutions for low income families

**generation2080™**  
your pathway to a legacy of wealth

## Tax Refund Planner

Name: \_\_\_\_\_

\$ \_\_\_\_\_ **Tax Refund Last Year**

\$ \_\_\_\_\_ **Anticipated Tax Refund This Year**

\$ \_\_\_\_\_ **Anticipated Child Tax Credit This Year**

(\$1,800 for each child 5 and under; \$1,500 for each child 6-17)

\$ \_\_\_\_\_ **Priority 1:** \_\_\_\_\_

\$ \_\_\_\_\_ **Priority 2:** \_\_\_\_\_

\$ \_\_\_\_\_ **Priority 3:** \_\_\_\_\_

\$ \_\_\_\_\_ **Priority 4:** \_\_\_\_\_

\$ \_\_\_\_\_ **Balance Remaining**

Signed: \_\_\_\_\_