

Part I – General Questions for All Returns			
Yes	No	Unsure	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. At any time during 2020, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) or trust located in a foreign country?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Did you receive, send, sell, or exchange or otherwise acquire any interest in any virtual currency? e.g. Bitcoin
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Did you make purchases on the internet, or by mail order from out-of-state companies on which you DID NOT pay Michigan Sales Tax?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Check if you have a Will <input type="checkbox"/> or a Trust <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Did you give more than \$15,000 to any one individual during 2020
Part II – Your Income			
In 2020, did you (or your spouse, if married), RECEIVE			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Wages or salary? (Provide W-2 Forms)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Tip Income?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. Scholarships?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. Interest/Dividends? From: checking/savings accounts, bonds, CDs, brokerage firms (Forms 1099-INT, 1099-DIV, 1099-OID) etc.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. Self-employment income or loss (such as earnings from contract labor or your own small business? (Please provide details records of income and expense)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. Income or loss on the sale of stocks, bonds, or real estate (including your home) provide any Forms 1099-B or 1099-S
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12. Disability income (such as payments from SSA, VA, insurance, etc.) include any Form 1099-R
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13. Distributions from pensions, annuities, or IRAs (provide any Forms 1099-R)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14. Social Security or Railroad Retirement Benefits (provide Forms SSA-1099)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15. Income from a rental property (provide detailed records of income and expense)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16. Other income (gambling, lottery, prizes, awards, jury duty etc.) Specify _____ Provide Forms W-2G, 1099-MISC+
Part III – Life Events & Other Considerations			
During 2020, did you or your spouse			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	17. Did your spouse die during the year? Date of death: _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	18. Has there been a change in the number of dependents you can claim? Did you have a child, or are you losing a dependent because he or she is over 19 or a student and over 24?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	19. Make contributions to a retirement account <input type="checkbox"/> IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> 401(k) <input type="checkbox"/> Other _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28. Did you pay alimony during 2020. If yes, provide former spouse's Social Security Number and the date of your divorce. SSN - - - Divorced / /
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20. Have a Health Savings Account? (HSA) (Form 5498-SA or 1099-SA)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21. Have a debt from a mortgage or credit card cancelled or forgiven by the lender? (Form 1099-C or 1099-A)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	22. Have an Earned Income Credit (EIC) disallowed in a previous year? What year _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23. Pay any student loan interest?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24. Buy a home?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	25. Did you make estimated tax payments or apply last year's refund to your 2020 tax?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	26. If you are due a refund, do you want Direct Deposit? (provide a voided check)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	27. If you have balance due, do you want to pay by Direct Debit (provide a voided check)