

**FOR STEP TWO**

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 or trust located in a foreign country (such as a bank account, securities account, or brokerage account)?
<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 <b>**NEW**</b>
<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? <b>**NEW**</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Are you or your spouse if married, legally blind? <input type="checkbox"/> I am <input type="checkbox"/> My Spouse is <b>**NEW**</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Did you give more than \$15,000 to any one individual during 2020
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Did you receive a “Stimulus Payment” last summer? See separate form. <b>**NEW**</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6a. Did you receive a second stimulus payment before January 15? See separate form <b>**NEW**</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Did you make charitable contributions of at least \$600 during 2020? <b>**NEW**</b>
Part II – Your Income			
In 2020, did you (or your spouse, if married), RECEIVE			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. Wages or salary? (Provide W-2 Forms)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. Tip Income?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. Scholarships?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. 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"/>	12. Self-employment income or loss (such as earnings from contract labor or your own small business? (Please provide detailed records of income and expense)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13. 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"/>	13a. Did you receive Unemployment Benefits in 2020? Attach 1099-G <b>**NEW**</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14. Disability income (such as payments from SSA, VA, insurance, etc.) include any Form 1099-R
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15. Distributions from pensions, annuities, or IRAs (provide any Forms 1099-R)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16. Social Security or Railroad Retirement Benefits (provide Forms SSA-1099)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16a. Did you take an early distribution from an IRA or other retirement account because of COVID-19? <b>**NEW**</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	17. Income from a rental property (provide detailed records of income and expense)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	18. 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"/>	19. Did your spouse die during the year? Date of death:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20. 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"/>	21. 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"/>	22. 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"/>	23. Have a Health Savings Account? (HSA) (Form 5498-SA or 1099-SA)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24. Have a debt from a mortgage or credit card <u>cancelled or forgiven</u> by the lender? (Form 1099-C or 1099-A)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	25. Have an Earned Income Credit (EIC) disallowed in a previous year? What year _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	26. Pay any student loan interest?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	27. Buy a home?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28. 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"/>	29. If you are due a refund, do you want Direct Deposit? <b>(provide a voided check)</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30. If you have balance due, do you want to pay by Direct Debit? <b>(provide a voided check)</b>

If you think you may be able to itemize your deductions, please complete the checklist below. These deductions have to exceed \$12,400 if you are single or \$24,800 if you are married filing a joint return. 65 and older the amounts are \$14,050 and \$27,500 respectively.

**In 2020, did you, or your spouse, if married, PAY:  
(Check Yes, No, or Unsure to all questions below)**

- |                          |                          |                          |  |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 31. Medical expenses?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 32. Home mortgage interest?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 33. Do you have second home mortgage interest?                           |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 34. Real estate taxes for your home?                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 35. Have you refinanced your home since 2016?                            |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 36. Personal property taxes—license plate fees for cars ? How much _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 37. Charitable contributions?  |

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Spouse Signature, if married.

\_\_\_\_\_  
Date signed

**If you answered yes to any of the above regarding Itemized Deductions, please provide any statements you received from lending institutions (Form 1098-B) or taxing authorities (real estate tax bills) , and the total paid for license plates and charitable contributions.**