

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 2021, 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
<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? **NEW**
<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 **NEW**
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Did you give more than \$15,000 to any one individual during 2021?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Did you receive an “Economic Stimulus Payment” in 2021? Usually \$1400 per taxpayer and dependent. See separate form. **NEW for 2021**
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Did you make charitable contributions of at least \$300 if single or \$600 if married during 2021? You do not need to itemize to take this deduction.
Part II – Your Income			
In 2021, 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 2021? Attach 1099-G
<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"/>	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 2021, 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 2021. 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 in 2021? (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 2021 tax?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29. If you are due a refund, do you want Direct Deposit? (provide a voided check)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30. If you have balance due, do you want to pay by Direct Debit? (Highly recommended) (provide a voided check)

If you think you may be able to itemize your deductions, please complete the checklist below. These deductions must exceed \$12,550 if you are single or \$25,100 if you are married filing a joint return. For anyone 65 and older the amounts are \$14,250 and \$27,800 respectively.

**In 2021, 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.