

**TOOL CHECK**  
**1234 WASHTENAW AVE APT 3**  
**YPSILANTI, MI 48197**  
**2020 INCOME TAX RETURN**

TOOL CHECK  
1234 WASHTENAW AVE APT 3  
YPSILANTI MI 48197

# INVOICE

Description		Amount
PREPARATION OF 2020 FEDERAL/STATE FORMS & WORKSHEETS:  FORM 1040 RECOVERY REBATE CREDIT WORKSHEET EIC WITH NO DEPENDENTS FORM W-2 (WAGES AND TAX) FORM 1099-R (RETIREMENT DISTRIBUTIONS) (2) SSA WORKSHEET FORM 8879 (E-FILE SIGNATURE AUTHORIZATION) MI STATE NONRESIDENT RETURN		
	<b>Total Invoice</b>	\$0.00
	<b>Amount Paid</b>	\$0.00
	<b>Balance Due</b>	\$0.00

TAX YEAR: 2020  
OFFICE : 7Q00402389D3

PROCESS DATE: 02/03/2021

CLIENT : 111-22-3333 TOOL CHECK

BIRTH DATE : 01/01/1961 Age:60

ADDRESS : 1234 WASHTENAW AVE APT 3  
: YPSILANTI MI 48197

PREPARER : 995

Home : (734) 333-4567  
Work : -  
Cell : -  
STATUS : SINGLE  
FED TYPE: Electronic Mail  
ST TYPE : Electronic Mail  
E-MAIL :

PREPARER FEE :  
ELECTRONIC :  
TOTAL FEES :

EFFECTIVE RATE: 0.00%

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LISTING OF FORMS FOR THIS RETURN

FORM 1040  
RECOVERY REBATE CREDIT WORKSHEET  
FORM W-2  
FORM SSA-1099 (SOCIAL SECURITY BENEFITS)  
FORM 1099-R (RETIREMENT DISTRIBUTIONS)  
EARNED INCOME CREDIT WITH NO DEPENDENTS  
FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
MI STATE NONRESIDENT RETURN

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\* QUICK SUMMARY \*

<u>SUMMARY</u>	<u>FEDERAL</u>	<u>MI NONRESIDENT</u>
FILING STATUS	1	1
TOTAL INCOME	8950	8950
TOTAL ADJUSTMENTS	0	3950
ADJUSTED GROSS INCOME	8950	5000
DEDUCTIONS	12400	0
EXEMPTIONS	0	2654
TAXABLE INCOME	0	2346
TAX	0	100
CREDITS	0	0
PAYMENTS	784	123
REFUND	784	23
AMOUNT DUE	0	0
EARNED INCOME CREDIT	384	23

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\* W-2 INCOME FORMS SUMMARY \*

<u>T/S EMPLOYER</u>	<u>WAGES</u>	<u>FED WITH</u>	<u>FICA</u>	<u>MED TAX</u>	<u>STATE WITH ST</u>
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CLIENT : TOOL CHECK

111-22-3333

PREPARER : 995 DATE : 02/03/2021

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\* W-2 INCOME FORMS SUMMARY \*

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	<u>T/S</u>	<u>EMPLOYER</u>	<u>WAGES</u>	<u>FED WITH</u>	<u>FICA</u>	<u>MED TAX</u>	<u>STATE WITH ST</u>
1.	T	KROGER	5000	400	310	73	100 MI
		TOTALS.....	5000	400	310	73	100

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\* 1099-R INCOME FORMS SUMMARY \*

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	<u>[T/S]</u>	<u>PAYER</u>	<u>GROSS DIST</u>	<u>TAXABLE AMT</u>	<u>FED WITH</u>	<u>STATE WITH ST</u>
1.	T	VANGAURD	4000	3500	0	0 MI
2.	T	VANGAURD	500	450	0	0 MI
		TOTALS.....	4500	3950	0	0

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\* FORM SSA-1099 INCOME FORMS SUMMARY \*

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	<u>[T/S]</u>	<u>PAYER</u>	<u>SSA BENEFITS</u>	<u>FED WITH</u>	<u>PREMIUMS</u>
1.	T	U.S.	1000	0	500
		TOTALS.....	1000	0	500



☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.  VANGAURD 123 STREET ST ANN ARBOR MI 48103		1 Gross distribution \$ 4000		OMB No. 1545-0119  <b>2020</b>  Form <b>1099-R</b>		<b>Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.</b>		
		2a Taxable amount \$ 3500						
				2b Taxable amount not determined <input type="checkbox"/>			Total distribution <input type="checkbox"/>	
PAYER'S TIN  11-1200000		RECIPIENT'S TIN  111-22-3333		3 Capital gain (included in box 2a) \$		4 Federal income tax withheld \$		
RECIPIENT'S name TOOL CHECK  Street address (including apt. no.) 1234 WASHTENAW AVE  City or town, state or province, country, and ZIP or foreign postal code YPSILANTI MI 48197		5 Employee contributions/ Designated Roth contributions or insurance premiums \$		6 Net unrealized appreciation in employer's securities \$		This information is being furnished to the IRS.		
		7 Distribution code(s) 7		IRA/ SEP/ SIMPLE <input checked="" type="checkbox"/>	8 Other \$ %			
		9a Your percentage of total distribution %		9b Total employee contributions \$				
10 Amount allocable to IRR within 5 years \$		11 1st year of desig. Roth contrib. 0	12 FATCA filing requirement <input type="checkbox"/>	14 State tax withheld \$		15 State/Payer's state no. MI		16 State distribution \$ 3500
Account number (see instructions)		13 Date of payment		17 Local tax withheld \$		18 Name of locality		19 Local distribution \$

Form **1099-R**

www.irs.gov/Form1099R

Department of the Treasury - Internal Revenue Service

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.  VANGAURD 123 STREET ST ANN ARBOR MI 48103		1 Gross distribution \$ 500		OMB No. 1545-0119  <b>2020</b>  Form <b>1099-R</b>		<b>Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.</b>		
		2a Taxable amount \$ 450						
				2b Taxable amount not determined <input type="checkbox"/>			Total distribution <input type="checkbox"/>	
PAYER'S TIN  10-2000000		RECIPIENT'S TIN  111-22-3333		3 Capital gain (included in box 2a) \$		4 Federal income tax withheld \$		
RECIPIENT'S name TOOL CHECK  Street address (including apt. no.) 1234 WASHTENAW AVE  City or town, state or province, country, and ZIP or foreign postal code YPSILANTI MI 48197		5 Employee contributions/ Designated Roth contributions or insurance premiums \$		6 Net unrealized appreciation in employer's securities \$		This information is being furnished to the IRS.		
		7 Distribution code(s) 7		IRA/ SEP/ SIMPLE <input type="checkbox"/>	8 Other \$ %			
		9a Your percentage of total distribution %		9b Total employee contributions \$				
10 Amount allocable to IRR within 5 years \$		11 1st year of desig. Roth contrib. 0	12 FATCA filing requirement <input type="checkbox"/>	14 State tax withheld \$		15 State/Payer's state no. MI 20200000		16 State distribution \$ 450
Account number (see instructions)		13 Date of payment		17 Local tax withheld \$		18 Name of locality		19 Local distribution \$

Form **1099-R**

www.irs.gov/Form1099R

Department of the Treasury - Internal Revenue Service

## **Consent to Disclose Tax Return Information to VITA/TCE Tax Prep Sites**

### **Federal Disclosure**

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

I authorize UNITED WAY OF WASHTENAW COUNTY - VITA:

Global Carry Forward of data allows TaxSlayer LLC, the provider of the VITA/TCE tax software-to make your tax return information available to ANY volunteer site participating in the IRS's VITA/TCE program that you select to prepare a tax return in the next filing season. This means-you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year.

This consent is valid-through November 12, 2022

The tax return information that will be disclosed includes, but is not limited to,-demographic, financial and other personally identifiable information, about you, your tax return and your sources of income, which was input into the tax preparation software for the purpose of preparing your tax return.

This information includes-your name, address, date of birth, phone number, SSN, filing status, occupation, employer's name and address, and the amounts and sources of income, deductions and credits that were claimed on, or contained within, your tax return.

The tax return information that will be disclosed also includes-the name, SSN, date of birth, and relationship of any dependents that were claimed on your tax return.

You do not need to provide consent for the VITA/TCE partner preparing your tax return this year-Carry Forward will assist you only if you visit a different VITA or TCE partner next year.

Limitation on the Duration of Consent: I/we, the taxpayer, do not wish to limit the duration of the consent-of the disclosure of tax return information to a date earlier than presented above (November 12, 2022). If I/we wish to limit the duration of the consent of the disclosure to an earlier date, I will deny consent.

Limitation on the Scope of Disclosure:-I/we, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I/we wish to limit the scope of the disclosure of tax return information further than presented above, I/we will deny consent.

Taxpayer PIN: 11111

PIN Date 2/3/2021

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

## **Consent to Disclose/Use Information to the VITA programs Relational Office**

### **Federal Disclosure**

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

I authorize UNITED WAY OF WASHTENAW COUNTY - VITA:

3 Years-Disclosure: Tax Preparer will disclose the Personal Information to the Software Developer through Software Developer's tax preparation software. The software Developer will disclose the Personal Information to the VITA program Relational Office.

3 Years-Purpose: The purpose of the Disclosures is for the Software Developer to make available the Taxpayer's Personal Information to the VITA program Relational Office in order for them to provide support and administrative assistance to the Tax Preparer.

Taxpayer PIN: 11111

PIN Date 2/3/2021

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).



## IRS e-file Signature Authorization

OMB No. 1545-0074

- ▶ ERO must obtain and retain completed Form 8879.
- ▶ Go to [www.irs.gov/Form8879](http://www.irs.gov/Form8879) for the latest information.

Submission Identification Number (SID)

Taxpayer's name

Social security number

111-22-3333

Spouse's name

Spouse's social security number

<b>Part I</b>	<b>Tax Return Information – Tax Year Ending December 31, 2020</b>	(Enter year you are authorizing.)
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Enter whole dollars only on lines 1 through 5.

**Note:** Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1	Adjusted gross income . . . . .	1	8950
2	Total tax . . . . .	2	
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099 . . . . .	3	400
4	Amount you want refunded to you . . . . .	4	784
5	Amount you owe . . . . .	5	

**Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)**

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS **(a)** an acknowledgement of receipt or reason for rejection of the transmission, **(b)** the reason for any delay in processing the return or refund, and **(c)** the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at **1-888-353-4537**. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

**Taxpayer's PIN: check one box only**

☒ I authorize UNITED WAY OF WASHTENAW COUNTY - VI to enter or generate my PIN 

1	5	5	5	5
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 as my ERO firm name  
signature on the income tax return (original or amended) I am now authorizing.

☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ► Date ► 02/03/2021

**Spouse's PIN: check one box only**

☐ I authorize \_\_\_\_\_ to enter or generate my PIN \_\_\_\_\_ as my  
**ERO firm name**  
 signature on the income tax return (original or amended) I am now authorizing.

☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ► Date ►

**Practitioner PIN Method Returns Only—continue below**

### Part III Certification and Authentication – Practitioner PIN Method Only

**ERO's EFIN/PIN.** Enter your six-digit EFIN followed by your five-digit self-selected PIN.

4	0	4	4	2	6	9	8	7	6	5
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**Don't enter all zeros**

I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income tax return (original or amended) I am now authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and **Pub. 1345**, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ► UNITED WAY OF WASHTENAW COUNTY - VITA Date ► 02/03/2021

**ERO Must Retain This Form – See Instructions**  
**Don't Submit This Form to the IRS Unless Requested To Do So**

**Filing Status** ☒ Single ☐ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)  
Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial TOOL		Last name CHECK		Your social security number 111-22-3333	
If joint return, spouse's first name and middle initial		Last name		Spouse's social security number	
Home address (number and street). If you have a P.O. box, see instructions. 1234 WASHTENAW AVE				Apt. no. 3	
City, town, or post office. If you have a foreign address, also complete spaces below. YPSILANTI			State MI		ZIP code 48197
Foreign country name		Foreign province/state/county		Foreign postal code	
<b>Presidential Election Campaign</b> Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse					

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ☐ Yes ☒ No

**Standard Deduction** **Someone can claim:** ☐ You as a dependent ☐ Your spouse as a dependent  
☐ Spouse itemizes on a separate return or you were a dual-status alien

**Age/Blindness** **You:** ☐ Were born before January 2, 1956 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1956 ☐ Is blind

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see instructions):	
(1) First name	Last name			Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here ▶ <input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

Attach Sch. B if required.	<b>1</b>	Wages, salaries, tips, etc. Attach Form(s) W-2 . . . . .	<b>1</b>	5000
	<b>2a</b>	Tax-exempt interest . . . . .	<b>2b</b>	
	<b>3a</b>	Qualified dividends . . . . .	<b>3b</b>	
	<b>4a</b>	IRA distributions . . . . .	<b>4b</b>	3500
<b>Standard Deduction for—</b> <ul style="list-style-type: none"><li>• Single or Married filing separately, \$12,400</li><li>• Married filing jointly or Qualifying widow(er), \$24,800</li><li>• Head of household, \$18,650</li><li>• If you checked any box under <i>Standard Deduction</i>, see instructions.</li></ul>	<b>5a</b>	Pensions and annuities . . . . .	<b>5b</b>	450
	<b>6a</b>	Social security benefits . . . . .	<b>6b</b>	
	<b>7</b>	Capital gain or (loss). Attach Schedule D if required. If not required, check here . . . . . ▶ <input type="checkbox"/>	<b>7</b>	
	<b>8</b>	Other income from Schedule 1, line 9 . . . . .	<b>8</b>	
	<b>9</b>	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b> . . . . . ▶	<b>9</b>	8950
	<b>10</b>	Adjustments to income:		
	<b>a</b>	From Schedule 1, line 22 . . . . .	<b>10a</b>	
	<b>b</b>	Charitable contributions if you take the standard deduction. See instructions	<b>10b</b>	
	<b>c</b>	Add lines 10a and 10b. These are your <b>total adjustments to income</b> . . . . . ▶	<b>10c</b>	
	<b>11</b>	Subtract line 10c from line 9. This is your <b>adjusted gross income</b> . . . . . ▶	<b>11</b>	8950
<b>12</b>	<b>Standard deduction or itemized deductions</b> (from Schedule A) . . . . .	<b>12</b>	12400	
<b>13</b>	Qualified business income deduction. Attach Form 8995 or Form 8995-A . . . . .	<b>13</b>		
<b>14</b>	Add lines 12 and 13 . . . . .	<b>14</b>	12400	
<b>15</b>	<b>Taxable income.</b> Subtract line 14 from line 11. If zero or less, enter -0- . . . . .	<b>15</b>	0	

Form **1040** (2020)

QNA

## Social Security Benefits Worksheet—Lines 6a and 6b

Keep for Your Records



**Before you begin:**

- ✓ Figure any write-in adjustments to be entered on the dotted line next to Schedule 1, line 22 (see the instructions for Schedule 1, line 22).
- ✓ If you are married filing separately and you lived apart from your spouse for all of 2020, enter “D” to the right of the word “benefits” on line 6a. If you don’t, you may get a math error notice from the IRS.
- ✓ Be sure you have read the **Exception** in the line 6a and 6b instructions to see if you can use this worksheet instead of a publication to find out if any of your benefits are taxable.

<p>1. Enter the total amount from <b>box 5</b> of <b>all</b> your <b>Forms SSA-1099</b> and <b>RRB-1099</b>. Also enter this amount on Form 1040 or 1040-SR, line 6a .....</p> <p>2. Multiply line 1 by 50% (0.50) .....</p> <p>3. Combine the amounts from Form 1040 or 1040-SR, lines 1, 2b, 3b, 4b, 5b, 7, and 8 .....</p> <p>4. Enter the amount, if any, from Form 1040 or 1040-SR, line 2a .....</p> <p>5. Combine lines 2, 3, and 4 .....</p> <p>6. Enter the total of the amounts from Form 1040 or 1040-SR, line 10b, Schedule 1, lines 10 through 19, plus any write-in adjustments you entered on the dotted line next to Schedule 1, line 22 .....</p> <p>7. Is the amount on line 6 less than the amount on line 5?</p> <p><input type="checkbox"/> <b>No.</b>  None of your social security benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b.</p> <p><input checked="" type="checkbox"/> <b>Yes.</b> Subtract line 6 from line 5 .....</p> <p>8. If you are:</p> <ul style="list-style-type: none"> <li>• Married filing jointly, enter \$32,000</li> <li>• Single, head of household, qualifying widow(er), or married filing separately and you <b>lived apart</b> from your spouse for all of 2020, enter \$25,000</li> <li>• Married filing separately and you lived with your spouse at any time in 2020, skip lines 8 through 15; multiply line 7 by 85% (0.85) and enter the result on line 16. Then, go to line 17</li> </ul> <p>9. Is the amount on line 8 less than the amount on line 7?</p> <p><input checked="" type="checkbox"/> <b>No.</b>  None of your social security benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b. If you are married filing separately and you <b>lived apart</b> from your spouse for all of 2020, be sure you entered “D” to the right of the word “benefits” on line 6a.</p> <p><input type="checkbox"/> <b>Yes.</b> Subtract line 8 from line 7 .....</p> <p>10. Enter: \$12,000 if married filing jointly; \$9,000 if single, head of household, qualifying widow(er), or married filing separately and you <b>lived apart</b> from your spouse for all of 2020 .....</p> <p>11. Subtract line 10 from line 9. If zero or less, enter -0- .....</p> <p>12. Enter the <b>smaller</b> of line 9 or line 10 .....</p> <p>13. Enter one-half of line 12 .....</p> <p>14. Enter the <b>smaller</b> of line 2 or line 13 .....</p> <p>15. Multiply line 11 by 85% (0.85). If line 11 is zero, enter -0- .....</p> <p>16. Add lines 14 and 15 .....</p> <p>17. Multiply line 1 by 85% (0.85) .....</p> <p>18. <b>Taxable social security benefits.</b> Enter the <b>smaller</b> of line 16 or line 17. Also enter this amount on Form 1040 or 1040-SR, line 6b .....</p>	<p>1. <u>1000</u></p> <p>2. <u>500</u></p> <p>3. <u>8950</u></p> <p>4. <u></u></p> <p>5. <u>9450</u></p> <p>6. <u></u></p> <p>7. <u>9450</u></p> <p>8. <u>25000</u></p> <p>9. <u></u></p> <p>10. <u></u></p> <p>11. <u></u></p> <p>12. <u></u></p> <p>13. <u></u></p> <p>14. <u></u></p> <p>15. <u></u></p> <p>16. <u></u></p> <p>17. <u></u></p> <p>18. <u></u></p>
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**TIP** If any of your benefits are taxable for 2020 **and** they include a lump-sum benefit payment that was for an earlier year, you may be able to reduce the taxable amount. See Lump-Sum Election in Pub. 915 for details.

QNA

Worksheet **A**—2020 EIC—Line 27

Keep for Your Records



**Before you begin:** ✓ Be sure you are using the correct worksheet. Use this worksheet only if you answered “No” to Step 5, question 2. Otherwise, use Worksheet B.

**Part 1****All Filers Using Worksheet A**

1. Enter your earned income from Step 5.

1	5000
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2. Look up the amount on line 1 above in the EIC Table (right after Worksheet B) to find the credit. Be sure you use the correct column for your filing status and the number of children you have. Enter the credit here.

2	384
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If line 2 is zero,



You can't take the credit.

Enter “No” on the dotted line next to Form 1040 or 1040-SR, line 27.

3. Enter the amount from Form 1040 or 1040-SR, line 11.

3	8950
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4. Are the amounts on lines 3 and 1 the same?

☐ **Yes.** Skip line 5; enter the amount from line 2 on line 6.☒ **No.** Go to line 5.**Part 2****Filers Who Answered “No” on Line 4**

5. If you have:

- No qualifying children, is the amount on line 3 less than \$8,800 (\$14,700 if married filing jointly)?
- 1 or more qualifying children, is the amount on line 3 less than \$19,350 (\$25,250 if married filing jointly)?

☐ **Yes.** Leave line 5 blank; enter the amount from line 2 on line 6.

☒ **No.** Look up the amount on line 3 in the EIC Table to find the credit. Be sure you use the correct column for your filing status and the number of children you have. Enter the credit here.  
Look at the amounts on lines 5 and 2.  
Then, enter the **smaller** amount on line 6.

5	524
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**Part 3****Your Earned Income Credit**

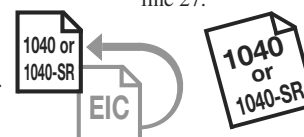
6. This is your earned income credit.

6	384
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Enter this amount on Form 1040 or 1040-SR, line 27.

**Reminder—**

✓ If you have a qualifying child, complete and attach Schedule EIC.



If your EIC for a year after 1996 was reduced or disallowed, see Form 8862, who must file, *earlier*, to find out if you must file Form 8862 to take the credit for 2020.

Worksheet **B**—2020 EIC—Line 27

Keep for Your Records



Use this worksheet if you answered “Yes” to Step 5, question 2.

- ✓ Complete the parts below (Parts 1 through 3) that apply to you. Then, continue to Part 4.
- ✓ If you are married filing a joint return, include your spouse’s amounts, if any, with yours to figure the amounts to enter in Parts 1 through 3.

**Part 1**
**Self-Employed,  
Members of the  
Clergy, and  
People With  
Church Employee  
Income Filing  
Schedule SE**

1a. Enter the amount from Schedule SE, Section A, line 3; or  
Section B, line 3, whichever applies.

b. Enter any amount from Schedule SE, Section B, line 4b and line 5a.

c. Combine lines 1a and 1b.

d. Enter the amount from Schedule SE, Section A, line 6; or  
Section B, line 13, whichever applies.

e. Subtract line 1d from line 1c.

1a	
+ 1b	
= 1c	
− 1d	
= 1e	

**Part 2**
**Self-Employed  
NOT Required  
To File  
Schedule SE**

For example, your  
net earnings from  
self-employment  
were less than \$400.

2. Don’t include on these lines any statutory employee income, any net profit from services performed as a notary public, any amount exempt from self-employment tax as the result of the filing and approval of Form 4029 or Form 4361, or any other amounts exempt from self-employment tax.

a. Enter any net farm profit or (loss) from Schedule F, line 34; and  
from farm partnerships, Schedule K-1 (Form 1065), box 14, code A\*.

b. Enter any net profit or (loss) from Schedule C, line 31; and Schedule  
K-1 (Form 1065), box 14, code A (other than farming)\*.

c. Combine lines 2a and 2b.

2a	
+ 2b	
= 2c	

\*If you have any Schedule K-1 amounts, complete the appropriate line(s) of Schedule SE, Section A. Reduce the Schedule K-1 amounts as described in the Partner’s Instructions for Schedule K-1. Enter your name and social security number on Schedule SE and attach it to your return.

**Part 3**
**Statutory Employees  
Filing Schedule C**

3. Enter the amount from Schedule C, line 1, that you are filing as a  
statutory employee.

3	
---	--


**Part 4**
**All Filers Using  
Worksheet B**

**Note.** If line 4b includes income on which you should have paid self-employment tax but didn’t, we may reduce your credit by the amount of self-employment tax not paid.

4a. Enter your earned income from Step 5.

b. Combine lines 1e, 2c, 3, and 4a. **This is your total earned income.**


4a	5000
4b	5000

If line 4b is zero or less,  You can’t take the credit. Enter “No” on the dotted line next to Form 1040 or 1040-SR, line 27.

5. If you have:

- 3 or more qualifying children, is line 4b less than \$50,954 (\$56,844 if married filing jointly)?
- 2 qualifying children, is line 4b less than \$47,440 (\$53,330 if married filing jointly)?
- 1 qualifying child, is line 4b less than \$41,756 (\$47,646 if married filing jointly)?
- No qualifying children, is line 4b less than \$15,820 (\$21,710 if married filing jointly)?

☒ **Yes.** If you want the IRS to figure your credit, see *Credit figured by the IRS*, earlier. If you want to figure the credit yourself, enter the amount from line 4b on line 6 of this worksheet.

☐ **No.**  You can’t take the credit. Enter “No” on the dotted line next to Form 1040 or 1040-SR, line 27.


**Part 5****All Filers Using Worksheet B**

6. Enter your total earned income from Part 4, line 4b.

<b>6</b>	5000
----------	------

7. Look up the amount on line 6 above in the EIC Table to find the credit. Be sure you use the correct column for your filing status and the number of children you have. Enter the credit here.

<b>7</b>	384
----------	-----

If line 7 is zero,  You can't take the credit.  
Enter "No" on the dotted line next to Form 1040 or 1040-SR, line 27.

8. Enter the amount from Form 1040 or 1040-SR, line 11.

<b>8</b>	8950
----------	------

9. Are the amounts on lines 8 and 6 the same?

- ☐ **Yes.** Skip line 10; enter the amount from line 7 on line 11.
- ☒ **No.** Go to line 10.

**Part 6****Filers Who Answered "No" on Line 9**

10. If you have:

- No qualifying children, is the amount on line 8 less than \$8,800 (\$14,700 if married filing jointly)?
- 1 or more qualifying children, is the amount on line 8 less than \$19,350 (\$25,250 if married filing jointly)?

☐ **Yes.** Leave line 10 blank; enter the amount from line 7 on line 11.

☒ **No.** Look up the amount on line 8 in the EIC Table to find the credit. Be sure you use the correct column for your filing status and the number of children you have. Enter the credit here.

<b>10</b>	524
-----------	-----

Look at the amounts on lines 10 and 7.  
Then, enter the **smaller** amount on line 11.

**Part 7****Your Earned Income Credit**

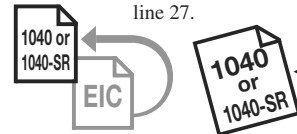
11. This is your earned income credit.

<b>11</b>	384
-----------	-----

Enter this amount on Form 1040 or 1040-SR, line 27.

**Reminder—**

- ✓ If you have a qualifying child, complete and attach Schedule EIC.






If your EIC for a year after 1996 was reduced or disallowed, see Form 8862, who must file, *earlier*, to find out if you must file Form 8862 to take the credit for 2020.

## Recovery Rebate Credit Worksheet—Line 30

- Before you begin:** ✓ See the instructions for line 30 to find out if you can take this credit and for definitions and other information needed to fill out this worksheet.  
 ✓ If you received Notice 1444 and Notice 1444-B, have them available.

Don't include on line 16 or 19 any amount you received but later returned to the IRS.

1.	Can you be claimed as a dependent on another person's 2020 return? If filing a joint return, go to line 2. <input checked="" type="checkbox"/> <b>No.</b> Go to line 2. <input type="checkbox"/> <b>Yes.</b>  You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.	
2.	Does your 2020 return include a valid social security number (defined under <i>Valid social security number</i> , earlier) for you and, if filing a joint return, your spouse? <input checked="" type="checkbox"/> <b>Yes.</b> Skip lines 3 and 4, and go to line 5. <input type="checkbox"/> <b>No.</b> If you are filing a joint return, go to line 3. If you aren't filing a joint return,  you can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.	
3.	Was at least one of you a member of the U.S. Armed Forces at any time during 2020, and does at least one of you have a valid social security number (defined under <i>Valid social security number</i> , earlier)? <input type="checkbox"/> <b>Yes.</b> Your credit is not limited. Go to line 5. <input type="checkbox"/> <b>No.</b> Go to line 4.	
4.	Does one of you have a valid social security number (defined under <i>Valid social security number</i> , earlier)? <input type="checkbox"/> <b>Yes.</b> Your credit is limited. Go to line 5. <input type="checkbox"/> <b>No.</b>  You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.	
5.	If your EIP 1 was \$1,200 (\$2,400 if married filing jointly) plus \$500 for each qualifying child you had in 2020, skip lines 5 and 6, enter zero on lines 7 and 16, and go to line 8. Otherwise, enter: • \$1,200 if single, head of household, married filing separately, qualifying widow(er), or if married filing jointly and you answered "Yes" to question 4, or • \$2,400 if married filing jointly and you answered "Yes" to question 2 or 3. ....	5. <u>1200</u>
6.	Multiply \$500 by the number of qualifying children under age 17 at the end of 2020 listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you either checked the "Child tax credit" box or entered an adoption taxpayer identification number .....	6. _____
7.	Add lines 5 and 6 .....	7. <u>1200</u>
8.	If your EIP 2 was \$600 (\$1,200 if married filing jointly) plus \$600 for each qualifying child you had in 2020, skip lines 8 and 9, enter zero on lines 10 and 19, and go to line 11. Otherwise, enter: • \$600 if single, head of household, married filing separately, qualifying widow(er), or if married filing jointly and you answered "Yes" to question 4, or • \$1,200 if married filing jointly and you answered "Yes" to question 2 or 3. ....	8. <u>600</u>
9.	Multiply \$600 by the number of qualifying children under age 17 at the end of 2020 listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you either checked the "Child tax credit" box or entered an adoption taxpayer identification number .....	9. _____
10.	Add lines 8 and 9 .....	10. <u>600</u>
11.	Enter the amount from line 11 of Form 1040 or 1040-SR .....	11. <u>8950</u>
12.	Enter the amount shown below for your filing status: • \$150,000 if married filing jointly or qualifying widow(er) • \$112,500 if head of household • \$75,000 if single or married filing separately } .....	12. <u>75000</u>
13.	Is the amount on line 11 more than the amount on line 12? <input checked="" type="checkbox"/> <b>No.</b> Skip line 14. Enter the amount from line 7 on line 15 and the amount from line 10 on line 18. <input type="checkbox"/> <b>Yes.</b> Subtract line 12 from line 11.	13. _____
14.	Multiply line 13 by 5% (0.05) .....	14. _____
15.	Subtract line 14 from line 7. If zero or less, enter -0- .....	15. <u>1200</u>
16.	Enter the amount, if any, of EIP 1 that was issued to you (before offset for any past-due child support payment). You may refer to Notice 1444 or your tax account information at <a href="https://www.irs.gov/Account">IRS.gov/Account</a> for the amount to enter here .....	16. <u>1200</u>
17.	Subtract line 16 from line 15. If zero or less, enter -0-. If line 16 is more than line 15, you don't have to pay back the difference .....	17. _____
18.	Subtract line 14 from line 10. If zero or less, enter -0- .....	18. <u>600</u>
19.	Enter the amount, if any, of EIP 2 that was issued to you. You may refer to Notice 1444-B or your tax account information at <a href="https://www.irs.gov/Account">IRS.gov/Account</a> for the amount to enter here .....	19. <u>600</u>
20.	Subtract line 19 from line 18. If zero or less, enter -0-. If line 19 is more than line 18, you don't have to pay back the difference .....	20. _____
21.	<b>Recovery rebate credit.</b> Add lines 17 and 20. Enter the result here and, if more than zero, on line 30 of Form 1040 or 1040-SR .....	21. _____



## 2020 MICHIGAN Individual Income Tax Certification for e-file MI-8453

**NOTE: Do not send MI-8453 to the Michigan Department of Treasury unless requested to do so.**

1. Filer's First Name <b>TOOL</b>	M.I.	Last Name <b>CHECK</b>	2. Filer's Full Social Security No. (Example: 123-45-6789)  <b>111-22-3333</b>
If a Joint Return, Spouse's First Name	M.I.	Last Name	3. Spouse's Full Social Security No. (Example: 123-45-6789)
Home Address (Number, Street, or P.O. Box) <b>1234 WASHTENAW AVE APT 3</b>			
City or Town <b>YPSILANTI</b>		State <b>MI</b>	ZIP Code <b>48197</b>

### PART 1: TAX RETURN INFORMATION.

The taxpayer should obtain and keep a copy of the return.

#### Form MI-1040, Individual Income Tax Return

4. Total federal adjusted gross income from line 10 .....	4.	<b>8950</b>	<b>00</b>
5. Total Michigan income tax from line 20 .....	5.	<b>100</b>	<b>00</b>
6. Michigan tax withheld from line 29 .....	6.	<b>100</b>	<b>00</b>
7. Tax due from line 33 .....	7.		<b>00</b>
8. Refund from line 36 .....	8.	<b>23</b>	<b>00</b>

#### Form MI-1040CR, Homestead Property Tax Credit Claim

9. Homestead Property Tax Credit from line 44 .....	9.		<b>00</b>
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#### Form MI-1040 CR-7, Home Heating Credit Claim

10. Home Heating Credit Claim from line 47 .....	10.		<b>00</b>
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#### City of Detroit Tax Return Information

11. Adjusted Gross Income or Wages from Form 5118, line 9, Form 5119, line 9, or Form 5120, line 10 (Column A) .....	11.		<b>00</b>
12. Tax Due from Form 5118, line 22e, Form 5119, line 24e, or Form 5120, line 41e .....	12.		<b>00</b>
13. Refund from Form 5118, line 25, Form 5119, line 27, or Form 5120, line 44 .....	13.		<b>00</b>

### PART 2: CERTIFICATION AND E-FILE AUTHORIZATION

*Under penalties of perjury, I declare that I have examined this return including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete. The tax return information in Part 1 agrees with the amounts on the corresponding lines of my Michigan and/or City of Detroit tax return. I consent to allow my Intermediate Service Provider, transmitter or Electronic Return Originator (ERO) to send my return to IRS and subsequently by the IRS to the Michigan Department of Treasury and to receive an acknowledgment of receipt or reason for rejection of the transmission.*

Filer's Signature	Date <b>02-03-21</b>	Spouse's Signature	Date
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### PART 3: ELECTRONIC RETURN ORIGINATOR (ERO) AND PAID PREPARER CERTIFICATION

*I declare that the information contained in this electronic tax return is the information furnished to me by the taxpayer. If the taxpayer furnished me a completed tax return, I declare that the information contained in this electronic tax return is identical to that contained in the return provided by the taxpayer. If the furnished return was signed by a paid preparer, I declare I have entered the paid preparer's identifying information in the appropriate portion of this electronic return. If I am the paid preparer, under the penalties of perjury I declare that I have examined this electronic return, and to the best of my knowledge and belief, it is true, correct, and complete. This declaration is based on all information of which I have any knowledge.*

ERO Signature	Date <b>02-03-21</b>	ERO is (check all that apply) <input type="checkbox"/> Paid Preparer <input type="checkbox"/> Self-Employed	ERO's SSN or PTIN
Firm's Name (or yours if self-employed) <b>UNITED WAY OF WASHTENAW COUNTY - VITA</b>		FEIN	
Firm's Address (Street, City, State, ZIP Code) <b>2305 PLATT ROAD, ANN ARBOR, MI 48104</b>		Firm's Telephone Number <b>734-677-7205</b>	

Preparer's Name (print or type)		Check if self-employed <input type="checkbox"/>	
Preparer's Signature	Date	PTIN	
Firm's Name		Firm's EIN	
Firm's Address (Street, City, State, ZIP Code)		Firm's Telephone Number	

**Complete this form only if you are e-filing a Michigan or City of Detroit unlinked (standalone) return.**

**2020 MICHIGAN Individual Income Tax Return MI-1040****Amended Return** ☐  
(Include Schedule AMD)**Return is due April 15, 2021.** Type or print in blue or black ink.

1. Filer's First Name <b>TOOL</b>	M.I.	Last Name <b>CHECK</b>	2. Filer's Full Social Security No. (Example: 123-45-6789)  <b>111-22-3333</b>
If a Joint Return, Spouse's First Name	M.I.	Last Name	3. Spouse's Full Social Security No. (Example: 123-45-6789)
Home Address (Number, Street, or P.O. Box) <b>1234 WASHTENAW AVE APT 3</b>			
City or Town <b>YPSILANTI</b>		State <b>MI</b>	ZIP Code <b>48197</b>
4. School District Code (5 digits – see page 60) <b>10000</b>			
<b>5. STATE CAMPAIGN FUND</b> Check if you (and/or your spouse, if filing a joint return) want \$3 of your taxes to go to this fund. This will not increase your tax or reduce your refund. <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>a. <input type="checkbox"/> Filer</span> <span>b. <input type="checkbox"/> Spouse</span> </div>			<b>6. FARMERS, FISHERMEN, OR SEAFARERS</b>  <input type="checkbox"/> Check this box if 2/3 of your income is from farming, fishing, or seafaring.
<b>7. 2020 FILING STATUS.</b> Check one. a. <input checked="" type="checkbox"/> Single * If you check box "c," complete line 3 and enter spouse's full name below: <div style="border: 1px solid black; height: 20px; width: 150px; margin-top: 5px;"></div> b. <input type="checkbox"/> Married filing jointly c. <input type="checkbox"/> Married filing separately*			<b>8. 2020 RESIDENCY STATUS.</b> Check all that apply. a. <input type="checkbox"/> Resident b. <input checked="" type="checkbox"/> Nonresident * * If you check box "b" or "c," you must complete and include Schedule NR. c. <input type="checkbox"/> Part-Year Resident *

**9. EXEMPTIONS. NOTE:** If someone else can claim you as a dependent, check box 9e, enter 0 on line 9a and enter \$1,500 on line 9e (see instr.).

a. Number of exemptions (see instructions).....	9a.	<b>1</b>	x	\$4,750	9a.	<b>4750</b>	<b>00</b>
b. Number of individuals who qualify for one of the following special exemptions: deaf, blind, hemiplegic, paraplegic, quadriplegic, or totally and permanently disabled.....	9b.		x	\$2,800	9b.		00
c. Number of qualified disabled veterans.....	9c.		x	\$400	9c.		00
d. Number of Certificates of Stillbirth from MDHHS (see instructions).....	9d.		x	\$4,750	9d.		00
e. Claimed as dependent, see line 9 NOTE above.....	9e.	<input type="checkbox"/>			9e.		00
f. Add lines 9a, 9b, 9c, 9d and 9e. Enter here and on line 15.....	9f.				9f.	<b>4750</b>	<b>00</b>
<b>10. Adjusted Gross Income</b> from your U.S. Forms 1040 or 1040NR (see instructions).....	10.				10.	<b>8950</b>	<b>00</b>
<b>11. Additions from Schedule 1, line 9. Include Schedule 1</b> .....	11.				11.		00
<b>12. Total.</b> Add lines 10 and 11.....	12.				12.	<b>8950</b>	<b>00</b>
<b>13. Subtractions from Schedule 1, line 29. Include Schedule 1</b> .....	13.				13.	<b>3950</b>	<b>00</b>
<b>14. Income subject to tax.</b> Subtract line 13 from line 12. If line 13 is greater than line 12, enter "0".....	14.				14.	<b>5000</b>	<b>00</b>
<b>15. Exemption allowance.</b> Enter amount from line 9f or Schedule NR, line 19.....	15.				15.	<b>2654</b>	<b>00</b>
<b>16. Taxable income.</b> Subtract line 15 from line 14. If line 15 is greater than line 14, enter "0".....	16.				16.	<b>2346</b>	<b>00</b>
<b>17. Tax.</b> Multiply line 16 by 4.25% (0.0425).....	17.				17.	<b>100</b>	<b>00</b>

**NON-REFUNDABLE CREDITS**

		AMOUNT				CREDIT	
18. Income Tax Imposed by government units outside Michigan. Include a copy of the return (see instructions).....	18a.			00	18b.		00
19. Michigan Historic Preservation Tax Credit carryforward (see instructions).....	19a.			00	19b.		00
<b>20. Income Tax.</b> Subtract the sum of lines 18b and 19b from line 17. If the sum of lines 18b and 19b is greater than line 17, enter "0".....	20.				20.	<b>100</b>	<b>00</b>

Filer's Full Social Security Number

111-22-3333

21. Enter amount of Income Tax from line 20.....	21.	100	00
22. Voluntary Contributions from Form 4642, line 6. <b>Include Form 4642</b> .....	22.		00
23. <b>USE TAX.</b> Use tax due on Internet, mail order or other out-of-state purchases from Worksheet 1 (see instructions).....	23.		00
24. <b>Total Tax Liability.</b> Add lines 21, 22 and 23 .....	24.	100	00

**REFUNDABLE CREDITS AND PAYMENTS**

25. <b>Property Tax Credit. Include MI-1040CR or MI-1040CR-2</b> .....	25.		00
26. <b>Farmland Preservation Tax Credit. Include MI-1040CR-5</b> .....	26.		00
27. Earned Income Tax Credit. Multiply line 27a by 6% (0.06) and enter result on line 27b. ....	27a.	384	00
28. Michigan Historic Preservation Tax Credit (refundable). <b>Include Form 3581</b> .....	28.		00
29. Michigan tax withheld from Schedule W, line 6. <b>Include Schedule W (do not submit W-2s)</b> .....	29.	100	00
30. Estimated tax, extension payments and 2019 credit forward .....	30.		00
31. <b>2020 AMENDED RETURNS ONLY.</b> Taxpayers completing an original 2020 return should skip to line 32. Amended returns must <b>include Schedule AMD (see instructions)</b> .			
31a. <input type="checkbox"/> If you had a refund and/or credit forward on the original return, check box 31a and enter this amount as a negative number on line 31c.			
31b. <input type="checkbox"/> If you paid with the original return, check box 31b and enter the amount paid with the original return, plus any additional tax paid after filing, as a positive number on line 31c. Do not include interest or penalty.			
32. Total refundable credits and payments. Add lines 25, 26, 27b, 28, 29, 30 and 31c .....	32.	123	00

**REFUND OR TAX DUE**

33. If line 32 is less than line 24, subtract line 32 from line 24. If applicable, see instructions.			
Include interest <input type="text"/> 00 and penalty <input type="text"/> 00 .....	<b>YOU OWE</b>		
34. <b>Overpayment.</b> If line 32 is greater than line 24, subtract line 24 from line 32 .....	34.	23	00
35. <b>Credit Forward.</b> Amount of line 34 to be credited to your 2021 estimated tax for your 2021 tax return ...	35.		00
36. Subtract line 35 from line 34 .....	<b>REFUND</b>	23	00

**DIRECT DEPOSIT**

Deposit your refund directly to your financial institution! See instructions and complete a, b and c.

a. Routing Transit Number

b. Account Number

c. Type of Account

1. ☐ Checking 2. ☐ Savings**Deceased Taxpayer.** If Filer and/or Spouse died after December 31, 2019, enter dates below.  
**ENTER DATE OF DEATH ONLY.** Example: 04-15-2020 (MM-DD-YYYY)

Filer	<input type="text"/>	Spouse	<input type="text"/>
-------	----------------------	--------	----------------------

**Preparer Certification.** I declare under penalty of perjury that this return is based on all information of which I have any knowledge.

Preparer's PTIN, FEIN or SSN

S22015384

Preparer's Name (print or type)

**Taxpayer Certification.** I declare under penalty of perjury that the information in this return and attachments is true and complete to the best of my knowledge.

Filer's Signature	Date
	02-03-21
Spouse's Signature	Date

Preparer's Signature

Preparer's Business Name, Address and Telephone Number

UNITED WAY OF WASHTENAW COUN  
2305 PLATT ROAD  
ANN ARBOR MI 48104-☐ By checking this box, I authorize Treasury to discuss my return with my preparer.

Refund, credit, or zero returns. Mail your return to:

Michigan Department of Treasury, Lansing, MI 48956

Pay amount on line 33 (see instructions). Mail your check and return to: Michigan Department of Treasury, Lansing, MI 48929

**2020 MICHIGAN Withholding Tax Schedule**

Issued under authority of Public Act 281 of 1967, as amended.

Type or print in blue or black ink.

**Attachment 13**

**INSTRUCTIONS:** If you had Michigan income tax withheld in 2020, you must complete a *Withholding Tax Schedule* (Schedule W) to claim the withholding on your *Individual Income Tax Return* (MI-1040, line 29). Report military pay in Table 1 and military retirement benefits and taxable railroad retirement benefits (both Tier 1 and Tier 2) in Table 2 even if no Michigan tax was withheld. Include your completed Schedule W with Form MI-1040. See complete instructions on page 2 of this form. If you need additional space, include another Schedule W.

1. Filer's First Name  TOOL	M.I.  	Last Name  CHECK	2. Filer's Full Social Security No. (Example: 123-45-6789)  111-22-3333
If a Joint Return, Spouse's First Name	M.I.	Last Name	3. Spouse's Full Social Security No. (Example: 123-45-6789)

**TABLE 1: MICHIGAN TAX WITHHELD OR MILITARY PAY REPORTED ON W-2, W-2G or CORRECTED W-2 FORMS**

A Enter "X" for: Filer or Spouse		B Employer's identification number (Example: 38-1234567)	C Box c — Employer's name	D Box 1 — Wages, tips, other compensation		E Box 17 — Michigan income tax withheld	
X		111200000	KROGER	5000	00	100	00
					00		00
					00		00
					00		00
					00		00
Enter Table 1 Subtotal from additional Schedule W forms (if applicable).....							00
4. <b>SUBTOTAL.</b> Enter total of Table 1, column E. ....						100	00

**TABLE 2: MICHIGAN TAX WITHHELD OR MILITARY RETIREMENT BENEFITS AND RAILROAD RETIREMENT BENEFITS (BOTH TIER 1 AND TIER 2) REPORTED ON 1099 FORMS**

A Enter "X" for: Filer or Spouse		B Payer's federal identification number (Example: 38-1234567)	C Payer's name	D Taxable pension distribution, misc. income, etc. (see inst.)		E Michigan income tax withheld	
					00		00
					00		00
					00		00
					00		00
					00		00
Enter Table 2 Subtotal from additional Schedule W forms (if applicable).....							00
5. <b>SUBTOTAL.</b> Enter total of Table 2, column E. ....							00
6. <b>TOTAL.</b> Add lines 4 and 5. Enter here and carry to MI-1040, line 29.....						100	00

## 2020 MICHIGAN Schedule 1 Additions and Subtractions

Issued under authority of Public Act 281 of 1967, as amended.

Attachment 01

Include with Form MI-1040. Type or print in blue or black ink.

Filer's First Name	M.I.	Last Name	Filer's Full Social Security No. (Example: 123-45-6789)
TOOL		CHECK	111-22-3333

### Additions to Income (all entries must be positive numbers)

1. Gross interest and dividends from obligations issued by states (other than Michigan) or their political subdivisions.....	1.		00
2. Deduction for taxes on, or measured by, income including self-employment tax taken on your federal return (see instructions).....	2.		00
3. Gains from Michigan column of MI-1040D and MI-4797 .....	3.		00
4. Losses attributable to other states (see instructions) .....	4.		00
5. Net loss from federal column of your Michigan MI-1040D or MI-4797 .....	5.		00
6. Oil, gas, and nonferrous metallic mineral expenses (Michigan sourced) deducted to arrive at Adjusted Gross Income (AGI).....	6.		00
7. Federal Net Operating Loss deduction included in AGI.....	7.		00
8. Other (see instructions). Describe: .....	8.		00
9. Total additions. Add lines 1 through 8. Enter here and on MI-1040, line 11.....	9.		00

### Subtractions from Income (all entries must be positive numbers)

10. Income from U.S. government bonds and other U.S. obligations included in MI-1040, line 10. Include U.S. <i>Schedule B</i> if over \$5,000.....	10.		00
11. Amount included in MI-1040, line 10, from military retirement benefits due to service in the U.S. Armed Forces or Michigan National Guard, or taxable railroad retirement benefits .....	11.		00
12. Gains from federal column of Michigan MI-1040D and MI-4797 .....	12.		00
13. Income attributable to another state. Explain type and source: <u>SCHEDULE NR</u> .....	13.	3950	00
14. Taxable Social Security benefits or military pay (not retirement) included on MI-1040, line 10 ..	14.		00
15. Income earned while a resident of a Renaissance Zone (see instructions). .....	15.		00
16. Michigan state and local income tax refunds received in 2020 and included on MI-1040, line 10.....	16.		00
17. Michigan Education Savings Program, MI 529 Advisor Plan, and Michigan Achieving a Better Life Experience Program.....	17.		00
18. Michigan Education Trust .....	18.		00
19. Oil, gas, and nonferrous metallic minerals income (Michigan sourced) included in AGI .....	19.		00
20. Resident Tribal Member income exempted under a State/Tribal tax agreement or pursuant to <i>Revenue Administrative Bulletin 1988-47</i> .....	20.		00
21. Miscellaneous subtractions (see instructions). Describe: .....	21.		00

**2020 MICHIGAN Schedule 1 Additions and Subtractions**

Filer's First Name	M.I.	Last Name	Filer's Full Social Security No. (Example: 123-45-6789)
TOOL		CHECK	111-22-3333

**Deduction Based on Year of Birth**

Complete 22A through 22H if claiming the Michigan Standard Deduction, the retirement benefits deduction or the senior investment income deduction on lines 23, 24, 25, or 26. Check box(es) 22C and/or 22G **only** if you or your spouse received retirement benefits from employment with a governmental agency not covered by the federal Social Security Act (SSA exempt employment). **See instructions before continuing.**

22. FILER				SPOUSE			
A. Year of Birth (19xx)	B. Age as of 12-31-2020	C. Check if filer received benefits from SSA exempt employment	D. Check if retired as of 01-01-2013 and born after 1952	E. Year of Birth (19xx)	F. Age as of 12-31-2020	G. Check if spouse received benefits from SSA exempt employment	H. Check if retired as of 01-01-2013 and born after 1952
		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
23. <b>Tier 2 Michigan Standard Deduction.</b> Complete this line <b>ONLY</b> if the older of you or your spouse (if married) was born during the period January 1, 1946 through December 31, 1952, and reached age 67 before December 31, 2020. <b>Do not complete lines 24, 25 or 26</b> .....				23.			00
24. <b>Tier 3 Michigan Standard Deduction.</b> Complete this line <b>ONLY</b> if the older of you or your spouse (if married) was born during the period January 1, 1953 through January 1, 1954, and reached age 67 on or before December 31, 2020. <b>Do not complete lines 23, 25 or 26.</b> Enter amount from line 6 of Worksheet 2.....				24.			00
25. <b>Retirement benefits.</b> Enter amount from line 16, 27, 28 or 29 of Form 4884, <i>Michigan Pension Schedule</i> . <b>Include Form 4884</b> .....				25.			00
26. Dividend/interest/capital gains deduction for taxpayers <b>75 years and older</b> . Deduction is limited to \$11,983 for single or married filing separately filers and \$23,966 for joint filers, less any deduction for retirement benefits (see instructions).....				26.			00
<input type="checkbox"/> Check this box if you are the unremarried surviving spouse claiming a dividend, interest or capital gains deduction for someone born before 1946 who was at least age 65 at the time of death.							
27. Reserved. Skip to line 28.....				27.	X X X X X X X X X		00
28. Michigan Net Operating Loss .....				28.			00
29. <b>Total Subtractions.</b> Add lines 10 through 28. Enter here and on MI-1040, line 13.....				29.		3950	00

**2020 MICHIGAN Nonresident and Part-Year Resident Schedule**

Issued under authority of Public Act 281 of 1967, as amended.

Type or print in blue or black ink.

Include with Form MI-1040. Read all instructions before completing this form.

**Attachment 02**

1. Filer's First Name <b>TOOL</b>	M.I.	Last Name <b>CHECK</b>	2. Filer's Full Social Security No. (Example: 123-45-6789) <b>111-22-3333</b>
If a Joint Return, Spouse's First Name	M.I.	Last Name	3. Spouse's Full Social Security No. (Example: 123-45-6789)

**4. 2020 RESIDENCY STATUS:**

Check all that apply.

a. ☒ Nonresidentb. ☐ Part-Year Resident of Michigan.

Enter dates of Michigan residency in 2020\*

\*Dates of Michigan residency in 2020 (Enter dates as MM-DD-YYYY, Example: 04-15-2020)

	FILER	SPOUSE
FROM:	2020	2020
TO:	2020	2020

**Income Allocation**

	A. Total Income		B. Michigan Income		C. Other State(s) Income	
5. Wages, salaries, other payments (tips, etc.) .....	5000	00	5000	00		00
6. Interest and dividends .....		00		00		00
7. Business and farm income (include U.S. Schedules C and F) .....		00		00		00
8. Gains/losses from MI-1040D or U.S. Schedule D, and/or MI-4797 or U.S Form 4797 .....		00		00		00
9. Income reported on U.S. Schedule E (include U.S. Schedule E and supporting statements)....		00		00		00
10. Pensions, IRA distributions, annuities and Social Security (see Form 4884) .....	3950	00		00	3950	00
11. Other (see instructions) .....		00		00		00
12. Total income. Add lines 5 through 11 .....	8950	00	5000	00	3950	00
13. Enter the total adjustments from U.S. 1040, Schedule 1 Describe: .....		00		00		00
14. Subtract line 13 from line 12. The amount in column A should equal MI-1040, line 10. Enter amount in column C on Schedule 1, line 13 or, if a negative amount, enter as a positive amount on Schedule 1, line 4.	8950	00	5000	00	3950	00

**Exemption Allowance** (If one spouse is a full-year resident, and the other is not, see instructions.)

15. Enter amount from MI-1040, line 9f .....	15.	4750	00
16. Enter Michigan source income from line 14, column B .....	16.	5000	00
17. Enter total income from line 14, column A .....	17.	8950	00
18. Divide line 16 by line 17 (if line 16 is greater than line 17, enter 100%) .....	18.	55.866	%
19. If both spouses are part-year or nonresidents, multiply line 15 by the percentage on line 18 and enter here and on MI-1040, line 15. If one spouse is a full-year resident, complete Worksheet 6 and enter here and on MI-1040, line 15 .....	19.	2654	00