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

UNITED WAY OF WASHTENAW COUNTY - VITA 2305 PLATT ROAD ANN ARBOR MI 48104 (734) 677-7205

TOOL CHECK 1234 WASHTENAW AVE APT 3 YPSILANTI MI 48197 Preparer No.: 995

Client No. : XXX-XX-3333 Invoice Date: 02/03/2021

INVOICE

Description		Amount
PREPARATION OF 2020 FEDERAL/STATE FORMS FORM 1040-SR (TAX RETURN FOR SENIORS) RECOVERY REBATE CREDIT WORKSHEET FORM 1099-R (RETIREMENT DISTRIBUTIONS) (SSA WORKSHEET FORM 8879 (E-FILE SIGNATURE AUTHORIZATION) MI STATE RESIDENT RETURN	(2)	Amount
	Total Invoice	\$0.00
	Amount Paid	\$0.00
	Balance Due	\$0.00

TAX YEAR: 2020 PROCESS DATE: 02/03/2021

OFFICE : 7Q00402389D3

CLIENT : 111-22-3333 TOOL CHECK BIRTH DATE : 01/01/1945 Age:76

ADDRESS : 1234 WASHTENAW AVE APT 3 PREPARER : 995

: YPSILANTI MI 48197

 Home
 : (734) 333-4567
 PREPARER FEE
 :

 Work
 : ELECTRONIC
 :

 Cell
 : TOTAL FEES
 :

STATUS : SINGLE

FED TYPE: Electronic Mail

ST TYPE : Electronic Mail EFFECTIVE RATE: 0.00%

E-MAIL :

LISTING OF FORMS FOR THIS RETURN

FORM 1040-SR

RECOVERY REBATE CREDIT WORKSHEET

FORM SSA-1099 (SOCIAL SECURITY BENEFITS)

FORM 1099-R (RETIREMENT DISTRIBUTIONS)

FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)

MI STATE RESIDENT RETURN

* QUICK SUMMARY *

SUMMARY	FEDERAL	MI RESIDENT	
FILING STATUS	1	1	
TOTAL INCOME	13500	13500	
TOTAL ADJUSTMENTS	0	8500	
ADJUSTED GROSS INCOME	13500	5000	
DEDUCTIONS	14050	0	
EXEMPTIONS	0	4750	
TAXABLE INCOME	0	250	
TAX	0	11	
CREDITS	0	0	
PAYMENTS	1800	0	
REFUND	1800	0	
AMOUNT DUE	0	11	

* 1099-R INCOME FORMS SUMMARY *

	[T/S]	PAYER	GROSS DIST	TAXABLE AMT	FED WITH	STATE WITH ST
1.	Т	VANGAURD	8500	8500	0	0 MI
2.	T	VANGAURD	5000	5000	0	0 MI
		TOTALS	13500	13500	0	0

CLIENT: TOOL CHECK 111-22-3333

PREPARER : 995 DATE : 02/03/2021

* FORM SSA-1099 INCOME FORMS SUMMARY *

1.	 PAYER U.S.	SSA BENEFITS 14000	FED WITH	PREMIUMS 500
	TOTALS	14000	0	500

			СI	ED (if checked	J)			
PAYER'S name, street address country, ZIP or foreign postal co			-	Gross distribution	,	OMB No. 1545-0		Distributions From ensions, Annuities,
TTANCATION			\$	850	00	9000		Retirement or
VANGAURD 123 STREET ST			2a	Taxable amount	t	2020	Pr	rofit-Sharing Plans, IRAs, Insurance
ANN ARBOR MI 481	03						_	Contracts, etc.
			\$	850		Form 1099-I	R	
			2b	Taxable amount not determined	t	Total distribution		
PAYER'S TIN	RECIPIENT'S TIN	I	3	Capital gain (inc in box 2a)	luded	4 Federal inco withheld	me tax	
11-1200000	111-22-33	333	\$			\$		
RECIPIENT'S name			,	Employee contrib	butions/	6 Net unrealiz	ed	†
TOOL CHECK				Designated Roth contributions or insurance premiu	1	appreciation employer's		
			\$	•		\$		
Street address (including apt. n	o.)		7	Distribution	IRA/ SEP/	8 Other]
1234 WASHTENAW A	AVE			code(s) 7	SIMPLE	\$	%	This information is being furnished to
City or town, state or province, co YPSILANTI MI 481		eign postal code	9a	Your percentage distribution		9b Total employee	contributions	the IRS.
	11 1st year of desig.	12 FATCA filing	14	State tax withhele		15 State/Payer	's state no.	16 State distribution
within 5 years	Roth contrib.	requirement	\$			MI		\$ 8500
\$	0	0	\$					\$
Account number (see instructions)	13 Date of payment	17 \$	Local tax withhel	d	18 Name of loc	ality	19 Local distribution \$
			\$					\$
Form 1099-R	www.i	rs.gov/Form1099F		ED (if checked	d)	Department of	the Treasury -	- Internal Revenue Service
PAYER'S name, street address	city or town, state		_	Gross distribution		OMB No. 1545-0	119	Distributions From
country, ZIP or foreign postal co		•	\$	500	١0			ensions, Annuities, Retirement or
VANGAURD			ψ 2a	Taxable amount		2020	Pr	rofit-Sharing Plans,
123 STREET ST			-~	raxable amount	•			
ANN ARBOR MI 481	.03						1	IRAs, Insurance
			\$	500	00	Form 1099-I	R	IRAs, Insurance Contracts, etc.
PAYER'S TIN			\$ 2b	500 Taxable amount not determined		Form 1099-I Total distribution	R	·
PATER S TIN	RECIPIENT'S TIN	1		Taxable amount not determined Capital gain (inc	t	Total distribution 4 Federal inco		·
10-2000000	RECIPIENT'S TIN			Taxable amount not determined	t	Total distribution		·
10-2000000			3	Taxable amount not determined Capital gain (inc in box 2a)	t	Total distribution 4 Federal incomithheld	me tax	·
			3	Taxable amount not determined Capital gain (inc in box 2a) Employee contributions or	butions/	Total distribution 4 Federal inco withheld	me tax	·
10-2000000 RECIPIENT'S name			\$ 5	Taxable amount not determined Capital gain (inc in box 2a) Employee contril Designated Roth	butions/	Total distribution 4 Federal incomplete withheld \$ 6 Net unrealized appreciation employer's	me tax	·
10-2000000 RECIPIENT'S name TOOL CHECK	111-22-33		3 \$ 5	Taxable amount not determined Capital gain (inc in box 2a) Employee contril Designated Roth contributions or insurance premit	butions/	Total distribution 4 Federal inco withheld \$ 6 Net unrealiz appreciation employer's	me tax	·
10-2000000 RECIPIENT'S name	111-22-33 o.)		\$ 5 7	Taxable amount not determined Capital gain (inc in box 2a) Employee contributions or insurance premium Distribution code(s)	butions/	Total distribution 4 Federal incomplete withheld \$ 6 Net unrealized appreciation employer's \$ 8 Other	me tax ed n in securities	Contracts, etc. This information is
10-200000 RECIPIENT'S name TOOL CHECK Street address (including apt. n 1234 WASHTENAW A	o.) AVE buntry, and ZIP or for	333	\$ 5 7	Taxable amount not determined Capital gain (inc in box 2a) Employee contrib Designated Roth contributions or insurance premium Distribution code(s) 7 Your percentage	butions/ ums IRA/ SEP/ SIMPLE of total	Total distribution 4 Federal incommend withheld \$ 6 Net unrealized appreciation employer's \$ 8 Other \$ 9b Total employee	me tax ed n in securities	Contracts, etc. This information is
10-200000 RECIPIENT'S name TOOL CHECK Street address (including apt. n 1234 WASHTENAW A City or town, state or province, cc YPSILANTI MI 481	o.) AVE buntry, and ZIP or for	3 3 3 eign postal code	\$ 5 7 9a	Taxable amount not determined Capital gain (inc in box 2a) Employee contributions or insurance premium Distribution code(s) 7 Your percentage distribution	butions/ butions/ lums IRA/ SEP/ SIMPLE of total %	Total distribution 4 Federal incomplete withheld 5 Net unrealized appreciation employer's \$ Other \$ Description of the property of the pro	me tax ed in in securities % contributions	This information is being furnished to the IRS.
10-200000 RECIPIENT'S name TOOL CHECK Street address (including apt. n 1234 WASHTENAW A City or town, state or province, cc YPSILANTI MI 481	o.) AVE buntry, and ZIP or for	333	3 \$ 5 7 9a	Taxable amount not determined Capital gain (inc in box 2a) Employee contrib Designated Roth contributions or insurance premium Distribution code(s) 7 Your percentage	butions/ butions/ lums IRA/ SEP/ SIMPLE of total %	Total distribution 4 Federal inco withheld 5 Net unrealiz appreciation employer's 8 Other 9b Total employee \$	ed n in securities % contributions	This information is being furnished to the IRS. 16 State distribution
10-200000 RECIPIENT'S name TOOL CHECK Street address (including apt. n 1234 WASHTENAW A City or town, state or province, co YPSILANTI MI 481 10 Amount allocable to IRR within 5 years	o.) AVE buntry, and ZIP or for 97 11 1st year of desig. Roth contrib.	eign postal code	3 \$ 5 7 9a	Taxable amount not determined Capital gain (inc in box 2a) Employee contributions or insurance premium Distribution code(s) 7 Your percentage distribution	butions/ butions/ lums IRA/ SEP/ SIMPLE of total %	Total distribution 4 Federal incomplete withheld 5 Net unrealized appreciation employer's \$ Other \$ Description of the property of the pro	ed n in securities % contributions	This information is being furnished to the IRS. 16 State distribution \$ 5000
10-200000 RECIPIENT'S name TOOL CHECK Street address (including apt. n 1234 WASHTENAW A City or town, state or province, co YPSILANTI MI 481 10 Amount allocable to IRR	o.) AVE buntry, and ZIP or for .9 7 11 1st year of desig. Roth contrib. 0	eign postal code 12 FATCA filing requirement	3 \$ 5 7 9a 14 \$	Taxable amount not determined Capital gain (inc in box 2a) Employee contributions or insurance premium Distribution code(s) 7 Your percentage distribution	butions/ ums IRA/ SEP/ SIMPLE of total % d	Total distribution 4 Federal inco withheld 5 Net unrealiz appreciation employer's 8 Other 9b Total employee \$	me tax ed n in securities % contributions 's state no. 0000	This information is being furnished to the IRS. 16 State distribution

Form 1099-R

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.

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.

Form **8879**

(Rev. January 2021)

Department of the Treasury Internal Revenue Service

IRS e-file Signature Authorization

▶ ERO must obtain and retain completed Form 8879.

▶ Go to www.irs.gov/Form8879 for the latest information.

OMB No. 1545-0074

illerial nevertue Service					
Submission Identification Number (SID)					
Taxpayer's name	:	Social sec	urity numl	per	
TOOL CHECK		111-22	-3333		
Spouse's name		Spouse's s	ocial sec	urity numb	er
Part I Tax Return Information — Tax Year Ending December 31, 2020	(Enter)	oar vou	ı ara alı	thorizing	7)
Enter whole dollars only on lines 1 through 5.	(Enter)	year you	are au	ιποπειπί	J·)
Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.					
1 Adjusted gross income			1	1	13500
2 Total tax			2		
3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099			3		
4 Amount you want refunded to you			4		1800
5 Amount you owe					
Part II Taxpayer Declaration and Signature Authorization (Be sure you ge	et and ke	ер а со	py of y	our ret	urn)
Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amy knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Pareturn (original or amended) I am now authorizing. I consent to allow my intermediate service provided to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason of consumer of the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason of consumer of the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason of consumer of the IRS (a) an acknowledgement of receipt or reason of consumer of the IRS (a) an acknowledgement of receipt or reason of consumer of the IRS (a) an acknowledgement of receipt or reason of consumer of the IRS (a) an acknowledgement of receipt or reason of consumer of the IRS (a) and acknowledgement of receipt or receipt or receipt on the financial institution according authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to apayment of estimated tax, and the financial authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to apayment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancella business days prior to the payment (settlement) date. I also authorize the financial institutions involve taxes to receive confidential information necessary to answer inquiries and resolve issues related personal identification number (PIN) below is my signature for the income tax return (original or americal personal identification number (PIN) below is my signature for the income tax return (original or americal personal identification number (PIN) below is my signature for the income tax return (original or amended if you are entering your own PIN and your return is filed using the Practitioner Pinancial Agent to a financial information in the income tax return (original or amended if you are enter	art I above r, transmitt on for rejectize the U.S count indications terminate that on the part to the	are the a er, or election of the interest of the attention to debit the authorists must rocessing yment. I for now authorists was authorists was authorists was authorists was authorists and a construction of the interest o	mounts for transmister and its of and its of and its of the entry rization. The receipt of the elevation of the elevation and its of the elevation of the elevation and its of the elevation of the elevation of the elevation and its of the elevation of the elevat	from the inturn origin ssion, (b) designated paration so to this acc for evoke ved no la ectronic per knowledgend, if appl 3 3 3 digits, but er all zeros	ncome tax nator (ERO) the reason of Financial offware for count. This (cancel) a ster than 2 payment of the period of the the state of
Todi digriatare P		02/03/	2021		
Spouse's PIN: check one box only		Г			1
☐ I authorize to enter or ge	enerate m	y PIN			as my
ERO firm name				digits, but	
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 if you are entering your own PIN and your return is filed using the Practitioner Pibelow.		w author	izing. Cl		box only
Spouse's signature ▶ D	ate ►				
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 Don't 6	6 9 enter all ze		6 5
I certify that the above numeric entry is my PIN, which is my signature for the electronic individual in authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I a requirements of the Practitioner PIN method and Pub. 1345 , Handbook for Authorized IRS <i>e-file</i> Provi	am submit	ting this r	eturn in a	accordanc	
		02/03/	2021		
FRO Must Retain This Form — See Instruct	IODC				

Don't Submit This Form to the IRS Unless Requested To Do So

1040	-S	Department of the Treasury—Internal Rev U.S. Tax Return for S	enue Serv enio i	rice (99) 2(020	OMB No. 15	45-007	IRS Use On	ıly—Do	not writ	e or staple	in this space.
Filing Status Check only	⊠ □ If yo	Single Head of household (HOH) ou checked the MFS box, enter	the na	Married f Qualifying ame of your	g widow spouse. I	r(er) (QW) f you chec		Married fi	ling	sepa	arately	(MFS)
one box. Your first nan		ne if the qualifying person is a c middle initial	Last na	ame	<u>dependen</u>	t ▶						rity number
If joint return,	spous	e's first name and middle initial	CHEC Last na								22-3 social sec	333 curity number
		nber and street). If you have a P.O. b ENAW AVE	ox, see	instructions.				Apt. no.	1			on Campaign
	post o	ffice. If you have a foreign address, al	so com	plete spaces b		ate MI		code 3197	spc \$3	ouse if to go t	to this fu	ntly, want nd.
Foreign coun	try nan	ne	Fo	reign province	e/state/cou	inty	Foreig	ın postal code	not	chang	a box bege your to	
•		ing 2020, did you receive, st in any virtual currency?		send, excl	•				y . 1	▶ 「	່່Yes	X No
Standard Deduction	Sor :	neone can claim:	u as a arate r We	depender eturn or y ere born b	nt □ ou were efore Ja	Your spo a dual-s unuary 2,	use tatus 1956	as a depe alien Are	blin			
Dependent		Spouse:	□ Wa	as born be		_		☐ Is b		es for (see instru	ictions):
(see instructions	.s :):(1) F	First name Last name		(2) 300iai 300i	unity number	you	sinp to	Child tax		1 '	•	her dependents
If more than fou dependents, see instructions and check here ▶ ☐												
	1	Wages, salaries, tips, etc	. Atta	ch Form(s) W-2 .					1		
Attach Schedule B	2 a	Tax-exempt interest .	2a			b Taxab	le int	erest .		2b		
if required.	3a	Qualified dividends	3a			b Ordina	ary di	vidends	.	3b		
	4a	IRA distributions	4a			b Taxab	le an	nount .		4b		8500
	5a	Pensions and annuities	5a			b Taxab	le an	nount .		5b		5000
	6a	Social security benefits .	6a	1	4000	b Taxab	le an	nount .		6b		
	7	Capital gain or (loss). At check here								7		
	8	Other income from Scheo	dule 1	, line 9 .					.	8		
	9	Add lines 1, 2b, 3b, 4b, 5	b, 6b	, 7, and 8.	. This is	your tota	ıl inc	ome	>	9		13500
	10	Adjustments to income:					1					
	а	From Schedule 1, line 22				1	0a					
	b	Charitable contributions deduction. See instruction	•	ou take			0b					
	С	Add lines 10a and 10b. T	hese	are your t o	otal adj	ustment	s to i	ncome	>	10c		
	11	Subtract line 10c from lin	e 9. T	his is you	r adjust	ed gross	inco	ome	•	11		13500
For Disclosure	e, Priva	ncy Act, and Paperwork Reduction	Act Not	ice, see sepa	rate instruc	ctions.				Fo	orm 104	0-SR (2020)

Page **2**

111-22-3333 CHECK

Standard Deduction	12	Standard deduction or itemized deductions (from Schedule A)	12	14050
See Standard	13	Qualified business income deduction. Attach Form 8995 or Form 8995-A	13	
Deduction Chart on the last page	14	Add lines 12 and 13	14	14050
of this form.	15	Taxable income. Subtract line 14 from line 11. If zero or less, enter -0	15	0
	16	Tax (see instructions). Check if any from:		
		1 □ Form(s) 8814 2 □ Form 4972 3 □	16	
	17	Amount from Schedule 2, line 3	17	
	18	Add lines 16 and 17	18	
	19	Child tax credit or credit for other dependents	19	
	20	Amount from Schedule 3, line 7	20	
	21	Add lines 19 and 20	21	
	22	Subtract line 21 from line 18. If zero or less, enter -0	22	0
	23	Other taxes, including self-employment tax, from Schedule 2, line 10	23	0
	24	Add lines 22 and 23. This is your total tax	24	0
	25	Federal income tax withheld from:		
	а	Form(s) W-2		
	b	Form(s) 1099		
	С	Other forms (see instructions)		
	d	Add lines 25a through 25c	25d	
	26	2020 estimated tax payments and amount applied from 2019 return	26	
 If you have a qualifying 	27	Earned income credit (EIC) 27 _{NO}		
child, attach Sch. EIC.	28	Additional child tax credit. Attach Schedule 8812 28		
 If you have nontaxable 	29	American opportunity credit from Form 8863, line 8 . 29		
combat pay,	30	Recovery rebate credit. See instructions		
instructions.	31	Amount from Schedule 3, line 13		
	32	Add lines 27 through 31. These are your total other payments and refundable credits	32	1800
	33	Add lines 25d, 26, and 32. These are your total payments	33	1800

Go to www.irs.gov/Form1040SR for instructions and the latest information. QNA

Form 1040-SR (2020)

Form **1040-SR** (2020)

CHECK

Form 1040-SR (2020)										Page 3
Refund	34	If line 33 is more that amount you overpaid					is the	34			1800
	35a	Amount of line 34 you check here	u want ref	unded to	you. If Form 	8888 is atta	ached, ► □	35a	L		1800
Direct deposit? See	►b	Routing number XXX	X X X X	X X X	► c Type: □	Checking	Savings				
instructions.	►d	Account number XXX	X X X X	XXXX	X X X X	X X X					
	36	Amount of line 34 ye estimated tax			-	36					
Amount		Subtract line 33 from				ve now .	▶	37			
You Owe		Note: Schedule H and	d Schedule	SE filers.	line 37 may n	ot represen	t all of				
For details on how to pay,		the taxes you owe		,	,						
see instructions.		instructions for details			,	,					
instructions.	38	Estimated tax penalty	(see instru	uctions) .	•	38					
Third Party Designee	ins	you want to allow another structions	person to dis		urn with the IRS	. ▶ ☐ Yes	. Complet		<i>N</i> .	X N	lo
		signee's ne ▶		Phone no. ▶		Persor numbe	nal identifica er (PIN)	ition	П	Т	\Box
Sign Here	Under my kn	r penalties of perjury, I declare to consider the period and belief, they are truich preparer has any knowledge	ue, correct, and	mined this retu		ying schedules a	and staten				
	Yo	ur signature		Date	Your occupation			IRS ser			
Joint return?				02/03/21			(see i	ection Pl inst.)	N, ent	erit ne	ere
See instructions. Keep a copy for your records.	Sp	ouse's signature. If a joint return, b	oth must sign.	Date	Spouse's occupa	ation		-			se an nter it here
	Ph	one no. (734) 333-4567	1	Email address							
Paid		eparer's name	Preparer's si	gnature		Date	PTIN		Che	ck if:	
Preparer						02/03/21	S2201538	4		Self-e	employed
Use Only		m's name ▶ UNITED WAY			TY - VITA			ne no.		-677-	7205
	Fir	m's address ► 2305 PLATT ROAD	ANN ARBOR M	I 48104			Firm	's EIN I	>	_	

Go to www.irs.gov/Form1040SR for instructions and the latest information. QNA

Form **1040-SR** (2020)

CHECK 111-22-3333

Form 1040-SR (2020) Page **4**

Standard Deduction Chart*

Add the number of boxes checked in the "Age/Blindness" section of Standard Deduction on page 1 ▶ 1

IF your filing status is	AND the number of boxes checked is	THEN your standard deduction is
Single	1	\$14,050
olligie	2	15,700
	1	\$26,100
Married	2	27,400
filing jointly	3	28,700
	4	30,000
Qualifying	1	\$26,100
widow(er)	2	27,400
Head of	1	\$20,300
household	2	21,950
	1	\$13,700
Married filing	2	15,000
separately**	3	16,300
	4	17,600

^{*}Don't use this chart if someone can claim you (or your spouse if filing jointly) as a dependent, your spouse itemizes on a separate return, or you were a dual-status alien. Instead, see instructions.

Go to www.irs.gov/Form1040SR for instructions and the latest information. QNA

Form **1040-SR** (2020)

^{**}You can check the boxes for your spouse if your filing status is married filing separately and your spouse had no income, isn't filing a return, and can't be claimed as a dependent on another person's return.

TOOL CHECK 111-22-3333

Social Security Benefits Worksheet—Lines 6a and 6b

Keep for Your Records



Beto	Figure any write-in adjustments to be entered on the dotted line next to Schedular instructions for Schedule 1, line 22). If you are married filing separately and you lived apart from your spouse for at the right of the word "benefits" on line 6a. If you don't, you may get a math er Be sure you have read the <i>Exception</i> in the line 6a and 6b instructions to see it worksheet instead of a publication to find out if any of your benefits are taxable.	ll of 2 ror no	2020, enter "D" to otice from the IRS.
1.	Enter the total amount from box 5 of all your Forms SSA-1099 and RRB-1099. Also enter this amount on Form 1040 or 1040-SR, line 6a		
2.	Multiply line 1 by 50% (0.50)	2.	7000
3.	Combine the amounts from Form 1040 or 1040-SR, lines 1, 2b, 3b, 4b, 5b, 7, and 8	3.	13500
4.	Enter the amount, if any, from Form 1040 or 1040-SR, line 2a	4.	
5.	Combine lines 2, 3, and 4	5.	20500
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,		
7	line 22	6.	
7.			
	No. STOP None of your social security benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b.		
	X Yes. Subtract line 6 from line 5	7.	20500
8.	If you are: • Married filing jointly, enter \$32,000 • Single, head of household, qualifying widow(er), or married filing separately and you lived apart from your spouse for all of 2020, enter \$25,000 • 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	8.	25000
9.	Is the amount on line 8 less than the amount on line 7?		
	No. Stop 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 lived apart from your spouse for all of 2020, be sure you entered "D" to the right of the word "benefits" on line 6a.		
	☐ Yes. Subtract line 8 from line 7	9.	
10.	Enter: \$12,000 if married filing jointly; \$9,000 if single, head of household, qualifying widow(er), or married filing separately and you lived apart from your spouse for all of 2020	10.	
11.	Subtract line 10 from line 9. If zero or less, enter -0-	11.	
12.	Enter the smaller of line 9 or line 10	12.	
13.	Enter one-half of line 12	13.	
14.	Enter the smaller of line 2 or line 13	14.	
15.	Multiply line 11 by 85% (0.85). If line 11 is zero, enter -0	15.	
16.	Add lines 14 and 15	16.	
17.	Multiply line 1 by 85% (0.85)	17.	
18.	Taxable social security benefits. Enter the smaller of line 16 or line 17. Also enter this amount on Form 1040 or 1040-SR, line 6b	18.	
	If any of your benefits are taxable for 2020 and they include a lump-sum benefit payment that y year, you may be able to reduce the taxable amount. See Lump-Sum Election in Pub. 915 for definition of the second	vas fo 'etails	r an earlier

QNA

TOOL CHECK Recovery Rebate Credit Worksheet—Line 30

Defe			
Before	e you begin: See the instructions for line 30 to find out if you can take this credit and for definitions and of needed to fill out this worksheet. If you received Notice 1444 and Notice 1444-B, have them available.	ner into	rmation
	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.		
	$X N_0$. Go to line 2.		
	Yes. (STOP) You can't take the credit. Don't complete the rest of this		
2.	worksheet and don't enter any amount on line 30. Does your 2020 return include a valid social security number (defined under <i>Valid social security number</i> , earlier)		
2.	for you and, if filing a joint return, your spouse? X Yes. Skip lines 3 and 4, and go to line 5.		
	If you are filling a light notion, and a line 2		
	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)?		
	Yes. Your credit is not limited. Go to line 5.		
	No. Go to line 4.		
4.	Does one of you have a valid social security number (defined under <i>Valid social security number</i> , earlier)?		
	Yes. Your credit is limited. Go to line 5.		
	No. Stop 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.		
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	(
7.	Add lines 5 and 6		
8.	If your EIP 2 was \$600 (\$1,200 if married filing jointly) plus \$600 for each qualifying child you had in 2020, skip	/• <u> </u>	1200
0.	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.		
			600
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		
11.	Enter the amount from line 11 of Form 1040 or 1040-SR		
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 	12	75000
12	• \$75,000 if single or married filing separately Is the amount on line 11 more than the amount on line 12?		
13.			
	No. amount from line 10 on line 18.		
	Yes. Subtract line 12 from line 11.		
14.	Multiply line 13 by 5% (0.05)		
15.	Subtract line 14 from line 7. If zero or less, enter -0-	15	1200
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 IRS.gov/Account for the amount to enter here	16	
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		
18.	the difference	1/	600
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		
20.	information at <u>IRS.gov/Account</u> for the amount to enter here 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	19	
21.	the difference	20	600
21.	1040 or 1040-SR	21	1800

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

NOTE: Do not send MI-8453 to the Mid	higar	Department of T	reasury unl	ess rec	uested to d	o so.			
1. Filer's First Name	M.I.					1	ial S	ecurity No. (Example: 123-45-6789	
TOOL		CHECK				111-22-3333			
If a Joint Return, Spouse's First Name	M.I.	Last Name				1	- т -	-22-3333	
						3. Spouse's Full S	Socia	l Security No. (Example: 123-45-6	789)
Home Address (Number, Street, or P.O. Box)		2							
1234 WASHTENAW AVE A	Ab.I.	3				<u> </u>			
City or Town					ate n =			ZIP Code	
YPSILANTI				I	/II			48197	
PART 1: TAX RETURN INFORM									
The taxpayer should obtain and keep a c	. ,								
Form MI-1040, Individual Income Tax I								12500	Too
Total federal adjusted gross incor							4.	13500	•
5. Total Michigan income tax from lin							5.	11	-
6. Michigan tax withheld from line 29							6.	11	00
7. Tax due from line 33							7.	11	00
8. Refund from line 36				•••••			8.		00
Form MI-1040CR, Homestead Property							_		Too
9. Homestead Property Tax Credit fr							9.		00
Form MI-1040 CR-7, Home Heating Cro							40		Too
10. Home Heating Credit Claim from	line 4	· · · · · · · · · · · · · · · · · · ·					10.		00
City of Detroit Tax Return Information									
11. Adjusted Gross Income or Wages							11		امما
or Form 5120, line 10 (Column A) 12. Tax Due from Form 5118, line 226									00
13. Refund from Form 5118, line 25,									00
PART 2: CERTIFICATION AND				IE 44			13.		100
Michigan and/or City of Detroit tax retusend my return to IRS and subsequently rejection of the transmission. Filer's Signature	rn. i d v by th	e IRS to the Michi	gan Departm	nent of	Treasury and	to receive an acl	knov	vledgment of receipt or reason) to 1 for
Filet's Signature		l	03-21	Spous	e s Signature			Date	
		102 (77 21						
PART 3: ELECTRONIC RETUR	N OF	RIGINATOR (E	RO) AND	PAID	PREPARE	ER CERTIFIC	ΑT	ION	
I declare that the information contained completed tax return, I declare that the in If the furnished return was signed by a this electronic return. If I am the paid pr knowledge and belief, it is true, correct, a	forma paid p epare	tion contained in th preparer, I declare r, under the penalt	is electronic I have enter ies of perjury aration is bas	tax retured the I declared on a	rn is identical paid prepare are that I have all information	I to that contained er's identifying inf e examined this e	in to orm elect any	he return provided by the taxpa ation in the appropriate portion ronic return, and to the best of knowledge.	yer. n of
ERO Signature		Date	ERO is (che				ER	O's SSN or PTIN	
		02-03-21	Paid	Prepar	er :	Self-Employed			
Final Name (annual factor and annual)		02-03-21			Leen			,	
Firm's Name (or yours if self-employed) UNITED WAY OF WASHTI	INA	V COUNTY -	- VITA		FEIN				
Firm's Address (Street, City, State, ZIP Code)		. 0001111					Firr	n's Telephone Number	
2305 PLATT ROAD, AND		RBOR,MI 48	3104					34-677-7205	
Preparer's Name (print or type)								Check if self-employed	
Preparer's Signature		Date			PTIN				
Firm's Name		ı			Firm's EIN	N			
Firm's Address (Street, City, State, ZIP Code)	1					1	Fire	n's Telephone Number	
oueer, only, state, zir coue,	,						. 111	no reiephone Nullibel	

Amended Return

2020 MICHIGAN Individual Income Tax Return MI-1040

Return is due April 15, 20	21. Ty	ype o	print in blue or	black	ink.						(Inclu	ude Schedule AMD)	
1. Filer's First Name		M.I.	Last Name					2. F	iler's Fι	II Social Sec	curity	No. (Example: 123-45-6789))
TOOL			CHECK							111_	22-	-3333	İ
If a Joint Return, Spouse's First Name	9	M.I.	Last Name										
								3. S	pouse's	Full Social	Secur	rity No. (Example: 123-45-67	89)
Home Address (Number, Street, or P.			2										
1234 WASHTENAW A	VE A	AP.I.	3	04-4-	710.0-4-			14.0	-h I D	:-4-:-4 01-	/F -I:	::	긕
City or Town YPSILANTI				State MI	ZIP Code 48197			4. 5	CHOOL D		(5 alg 0 2 C	gits – see page 60) Y	
				1417	4019 A		FARI	MEDO I					\dashv
 STATE CAMPAIGN FUND Check if you (and/or your sp filing a joint return) want \$3 to go to this fund. This will n your tax or reduce your refu 	of your	r taxes		iler					this bo	k if 2/3 of y		AFARERS ncome is from farming,	
7. 2020 FILING STATUS. Che	ck one					8	. 2020	RESID	ENCY	STATUS.	Chec	k all that apply.	
a. X Single		* If y	ou check box "c,"	comple	ete		а. 🗶	Reside	ent				
. 🗖			3 and enter spous	se's full i	name							* If you check box "b" or "c," you must complete	
b. Married filing jointly		belo	W:				b	Nonres	sident '	•		and include Schedule	
								5	_			NR.	
c. Married filing separate	ely*					'	c	Part-Ye	ear Re	sident *			
9. EXEMPTIONS. NOTE: If	oomoo	no olo	o con claim you c	oo o dor	ondont of	hook l	201/ 00	ontor 0	on line	Oo and on	tor C	1 500 on line 00 (000 inst	
9. EXEMPTIONS. NOTE : If	someo	ne eis	e can ciaim you a	as a dep	endent, ci	necki	oox 9e, (enter o d		ga and en	rei þ	1,500 on line 9e (see inst	.1.).
a. Number of exemptions (see in	etructi	one)				9a	1	. _x	\$4,750	02	4750	امما
b. Number of individuals w	•		,					· -	 ^	ψ4,7 30	Ja.		00
blind, hemiplegic, parap									l _x	\$2,800	9b.		00
c. Number of qualified disa	-		-		-				x	\$400	9c.		00
d. Number of Certificates of									x	\$4,750	9d.		00
			,		•								П
e. Claimed as dependent,	see lin	e 9 N	OTE above				9e	. 🔲			9e.		00
												4550	
f. Add lines 9a, 9b, 9c, 9d	and 9	e. Ent	er here and on lir	ne 15							9f.	4750	00
					_,							13500	
10. Adjusted Gross Income f	rom yo	our U.S	6. Forms <i>1040</i> or	1040NF	₹ (see inst	ructio	ns)			10.		13300	00
11. Additions from Schedule 1,	lino O	Inclu	do Cobodulo 1							11			00
11. Additions from Schedule 1,	, iii le 9	. IIICIU	de Scriedule 1							11.			00
12. Total. Add lines 10 and 11.										12.		13500	امما
13. Subtractions from Schedule	e 1, lin	e 29.	Include Schedu	le 1						13.		8500	00
										Г			
14. Income subject to tax. Su	ıbtract	line 13	3 from line 12. If	line 13 i	s greater t	than li	ine 12, e	enter "0"	·	14.		5000	00
												4550	
Exemption allowance. En	iter am	ount f	rom line 9f or Sch	nedule N	NR, line 19)				15.		4750	00
												250	
16. Taxable income. Subtract	line 15	from	line 14. If line 15	is grea	ter than lir	ne 14,	enter "()"		16.		250	00
17. Tax. Multiply line 16 by 4.2	E0/. (O	0425)								17.		11	امما
NON-REFUNDABLE CREDIT		.0423)					AMOU			17		CREDIT	00
18. Income Tax Imposed by go		ont un	ite outeide Michie	nan					\neg] Г			\neg
Include a copy of the return					8a.				00	18b.			00
19. Michigan Historic Preserva										1			Ť
instructions)					9a				00	19b.			00
20. Income Tax. Subtract the s										Γ			
If the sum of lines 18b and	19b is	great	er than line 17, er	nter "0".						20.		11	00

2020 M	II-1040, Page 2 of 2	Filer's	Full Social Se	ecurity Numbe	ar .	111	00 2222		
		1 1101 3	Full Social St	Bounty Numbe			-22-3333		
21.	Enter amount of Income Tax from line 20						21.	11	
22.	Voluntary Contributions from Form 4642,						22.		00
23.	USE TAX. Use tax due on Internet, mail of Worksheet 1 (see instructions)						23.		00
24	Total Tax Liability. Add lines 21, 22 and	1 22				24		11	nn
	JNDABLE CREDITS AND PAYMENT					Z-7.			
05	To control Toro Consult Insolute MI 4040C	E41 4040CD (_				25		20
25.	Property Tax Credit. Include MI-1040C	R or MI-1040CK-A	2				25.		00
26.	Farmland Preservation Tax Credit. Incl	lude MI-1040CR-	5				26.		00
				FE	DERAL			MICHIGAN	
27.	Earned Income Tax Credit. Multiply line 2 enter result on line 27b	• ' '				00 2	7b.		00
28.	Michigan Historic Preservation Tax Credi	it (refundable). Inc	lude Form	3581			28.		00
29.	Michigan tax withheld from Schedule W,	line 6. Include Sc	chedule W (do not subr	mit W-2s)		29.		00
30.	Estimated tax, extension payments and 2	2019 credit forwar	d				30.		00
31.		payers completing	an original				00.		
	31a. If you had a refund and/or credit negative number on line 31c.	forward on the origin	nal return, che	eck box 31a ar	nd enter this amo	ount as a			
	31b. If you paid with the original return any additional tax paid after filing						31c.		00
32.	Total refundable credits and payments. A	Add lines 25, 26, 2	7b, 28, 29, 3	30 and 31c		32.			00
REFU	JND OR TAX DUE								
33.	If line 32 is less than line 24, subtract line	e 32 from line 24. I	lf applicable	, see instruc	tions.				
	Include interest 00 and pe	enalty	00		YOU OWE	33.		11	00
34.	Overpayment. If line 32 is greater than li	line 24, subtract lir	ne 24 from li	ne 32		34.	ı		00
35	Credit Forward. Amount of line 34 to be	credited to your 2	0021 estimat	ed tax for vo	our 2021 tax re	turn	35.		00
00.	Order Forward. Amount of this on to so	ordinou to your z	.021 00	eu lan ioi , o	JUI 2021 IUN 13	Tunn	33.1		00
	Subtract line 35 from line 34					36.			00
Depos	ECT DEPOSIT it your refund directly to your financial tion! See instructions and complete a, b	a. Routing Transit I	Number	b. <i>i</i>	Account Numbe	er	c. Typ 1. Checkir	e of Account ng 2. Saving	gs
Dece ENTE	eased Taxpayer. If Filer and/or Spouse diec ER DATE OF DEATH ONLY. Example: 04-15	d after December 31, 5-2020 (MM-DD-YYY	, 2019, enter ((Y)	dates below.	this return is ba	sed on all in	formation of which	er penalty of perjury th I have any knowledg	hat ge.
Filer	Sp	oouse			Preparer's PTI	,	SSN		
	payer Certification. I declare under penalt tachments is true and complete to the best of m		information in	this return	Preparer's Nam		ype)		
	s Signature	y Moneage.	Date 02-03-	_ 21	Preparer's Sigr	nature			
Spous	se's Signature		Date	_77	Preparer's Bus	iness Name	, Address and Tele	phone Number	
					UNITED	YAW C	OF WASH	ENAW COUN	1
					2305 F	PLATT	ROAD		
	By checking this box, I authorize Treasury	ry to discuss my re	turn with my	/ preparer.	ANN AF	RBOR M	II 48104-	-	

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 Schedule 1 Additions and Subtractions

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

Include with Form MI-10	40. Type or print	in blue or black ink.			Attachment 01
Filer's First Name	M.I.	Last Name	Filer's Full Socia	al Security No. (Example	: 123-45-6789)
TOOL		CHECK		1-22-3333	
Additions to Income	(all entries mus	t be positive numbers)			
1. Gross interest and	dividends from o	bligations issued by states al subdivisions		1.	00
2. Deduction for taxes	on, or measured	d by, income including self-em	ployment tax taken on	1.	
your federal return	(see instructions)		2.	00
3. Gains from Michiga	an column of MI-1	1040D and MI-4797		3.	00
4. Losses attributable	to other states (s	see instructions)		4.	00
5. Net loss from feder	al column of you	r Michigan MI-1040D or MI-47	97	5.	00
_		neral expenses (Michigan soul	· ·	6.	00
7. Federal Net Opera	ting Loss deducti	on included in AGI		7.	00
8. Other (see instructi	ons). Describe: _			8.	00
9. Total additions. A	dd lines 1 throu	gh 8. Enter here and on MI-1	040, line 11	9.	00
Subtractions from In	come (all entrie	es must be positive numbers	3)		
10. Income from U.S. g	overnment bond	s and other U.S. obligations in	cluded in MI-1040, line 10.		
		000 , from military retirement benef		10.	00
		onal Guard, or taxable railroad		11.	00
12. Gains from federal	column of Michig	gan MI-1040D and MI-4797		12.	00
13. Income attributable	to another state	. Explain type and source:		13.	00
14. Taxable Social Sec	urity benefits or r	military pay (not retirement) inc	sluded on MI-1040, line 10	14.	00
15. Income earned whi	le a resident of a	Renaissance Zone (see instru	uctions)	15.	00
		refunds received in 2020 and		16.	00
17. Michigan Education	n Savings Progra	m, MI 529 Advisor Plan, and N	lichigan Achieving a Better	17.	00
18. Michigan Education	n Trust			18.	00
		nerals income (Michigan sourc	,	19.	00
Resident Tribal Me pursuant to Revent	mber income exe ue Administrative	empted under a State/Tribal tax Bulletin 1988-47	cagreement or	20.	00
21. Miscellaneous subt	ractions (see ins	tructions). 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**.

befo	re continuing.										
22.		FI	ILER					SPO	USE		
	A.	B.	C.	D.		E.	F.		G.	H.	
	Year of Birth (19xx)	Age as of 12-31-2020	Check if filer received benefits from SSA exempt employment	Check if retired as of 01-01-2013 and born after 1952		Year of Birth (19xx)	Age as of 12-31-2020)	Check if spouse received benefits from SSA exempt employment	Check if ref as of 01-01-2013 born after 1	and
	1945	75									
	spouse (if mar	ried) was born d	duction. Complete uring the period Jaccember 31, 2020.	anuary 1, 1946 t	thro	ough Decembe	er 31, 1952,	23.			00
	spouse (if mar reached age 6	ried) was born d 7 on or before D	duction. Complete luring the period J recember 31, 2020 ret 2	anuary 1, 1953). Do not comp	thr let	ough January e lines 23, 25	1, 1954, and or 26. Enter	24.			00
25.	Retirement be Pension Sched	enefits. Enter and dule. Include Fo	nount from line 16 orm 4884	, 27, 28 or 29 of	Fc	orm 4884, <i>Mich</i>	nigan	25.		8500	00
	26. Dividend/interest/capital gains deduction for taxpayers 75 years and older . 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
			unremarried survivin born before 1946 w								
27.	Reserved. Skip	o to line 28						27.	XXXXX	XXXX	00
28.	Michigan Net (Operating Loss						28.			00
29.	Total Subtrac	tions. Add lines	10 through 28. Er	nter here and on	M	I-1040, line 13		29.		8500	00

2020 MICHIGAN Pension Schedule (Form 4884)

Generally, if the filer and spouse were born after 1945, STOP; you are not entitled to a retirement and pension benefits subtraction. **For exceptions**, refer to the instructions and the questionnaire "Which Section of Form 4884 Should I Complete?" for additional assistance.

Failure to complete this form in its entirety will result in your pension subtraction being denied.

Issued under authority of Public Act 281 of 1967, as amended. Type or print in blue or black ink.

Attachment 23

1. Filer's First Name	M.I.	Last Name	2. Filer's Full Social Security No. (Example: 123-45-6789)
TOOL		CHECK	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)

PART 1: FILING INFORMATION

4. Primary Filer Year of Birth (ex. 19xx)	5. If a Joint Return, Spouse Year of Birth (ex. 19xx)							
1045								
1945								
6. Check here if you were born after 1953, were retired as of January 1, 2013, and received retirement benefits from SSA exempt employment.								
7. If you are receiving retirement and pension benefits from a decease	7. If you are receiving retirement and pension benefits from a deceased spouse who was born prior to January 1, 1953, complete lines 7a through 7d.							
7a. Deceased Spouse Name 7b.	Deceased Spouse Full Social Security No. 7c. Deceased Spouse Year of Birth (ex. 19xx							
Surviving spouse. Check here if you elect to subtract retirement and pension benefits based on the year of birth of your deceased spouse. You must be the surviving spouse who (1) has reached age 67, (2) has not remarried, and (3) claimed a subtraction for retirement and pension benefits on a return jointly filed with the decedent in the year they died. See instructions.								

PART 2: RETIREMENT AND PENSION BENEFITS (see instructions)

Do not enter Social Security, military or railroad retirement benefits here (see Schedule 1).

4	В	С	D	E	l F	
Enter "X" for Decease		Payer FEIN (from 1099-R) (Example: 38-1234567) (see instructions)	Distribution Code	Name of Payer	Pension Amount Included in AGI	
		11-1200000	7	VANGAURD	8500	00
						00
						00
						00
						00
						00
						00
						00
						00
						00
		"X" for Enter "X" for	"X" for Deceased Spouse Payer FEIN (from 1099-R) (Example: 38-1234567) (see instructions)	"X" for public Enter "X" for Deceased Spouse Payer FEIN (from 1099-R) (Example: 38-1234567) (see instructions) Distribution Code	"X" for public Enter "X" for Deceased Spouse Payer FEIN (from 1099-R) (Example: 38-1234567) (see instructions) Distribution Code Name of Payer	*X" for Decased Spouse Rample: 38-1234567) (see instructions)

Retirement and Pension Benefits.

111-22-3333

PART 3: To determine which section below to complete, review the questionnaire: "Which Section of Form 4884 Should I Complete?" in the MI-1040 book. Complete only one of the sections below.

SECI	ION A:			
9.	Enter \$53,759 if single or \$107,517 if filing jointly. Reduce this amount by any military or railroad retirement benefits from Schedule 1, line 11	9.	53759	00
10.	Enter total public retirement and pension benefits (including public benefits received from a deceased spouse if deceased spouse was born prior to January 1, 1946 and died prior to 2020).	10.		00
11.	Subtotal. Subtract line 10 from line 9. If line 10 is more than line 9, enter "0"	11.	53759	00
12.	Enter total private retirement and pension benefits (including private benefits received from a deceased spouse if deceased spouse was born prior to January 1, 1946 and died prior to 2020).	12.	8500	00
13.	If deceased spouse was born between January 1, 1946 and December 31, 1952 and died prior to 2020, enter deceased spouse retirement and pension benefits (maximum \$20,000 if single or \$40,000 if filing jointly).	13.		00
14.	Add lines 12 and 13.	14.	8500	00
15.	Enter the smaller of lines 11 or 14	15.	8500	00
16.	Total Retirement and Pension Benefits Subtraction. Add lines 10 and 15. Carry this amount to Schedule 1, line 25	16.	8500	00
SECT	ION B:			
17.	Enter \$53,759 if single or \$107,517 if filing jointly. Reduce this amount by any military or railroad retirement benefits from Schedule 1, line 11	17.		00
18.	Enter public benefits received from a deceased spouse born prior to January 1, 1946 and died prior to 2020	18.		00
19.	Subtotal. Subtract line 18 from line 17. If line 18 is more than line 17, enter "0"	19.		00
20.	Enter private benefits received from a deceased spouse born prior to January 1, 1946 and died prior to 2020	20.		00
21.	Enter the smaller of lines 19 or 20	21.		00
22.	Add lines 18 and 21	22.		00
23.	Enter total filer and spouse retirement and pension benefits	23.		00
24.	Maximum Allowable Pension Deduction. See instructions	24.		00
25.	Subtract line 22 from line 24. If line 22 is more than line 24, enter "0"	25.		00
26.	Enter the smaller of lines 23 or 25	26.		00
27.	Total Retirement and Pension Benefits Subtraction. Add lines 22 and 26. Carry this amount to	07		
SECT	Schedule 1, line 25	27.		00
_	Total Retirement and Pension Benefits Subtraction. Enter total retirement and pension benefits, including benefits received from a deceased spouse who died prior to 2020 (maximum \$20,000 if single or \$40,000 if filing jointly). If you checked box 22C and/or 22G on Schedule 1 or have military or railroad retirement benefits reported on Schedule 1, line 11, see instructions. Carry this amount to Schedule 1, line 25	28.		00
SECT	ION D:			
	Total Retirement and Pension Benefits Subtraction. If you checked box 22C and/or 22G on Schedule 1 and the older of you or your spouse was born after January 1, 1954 but before January 2, 1959, enter retirement and pension benefits you received, up to \$15,000 per eligible taxpayer. If you have military or railroad retirement benefits reported on Schedule 1, line 11, see instructions. Carry this amount to Schedule 1, line 25	29.		00
	mondono. Carry this amount to obligate 1, line 20	_~		

Instructions for Form MI-1040-V 2020 Michigan Individual Income Tax Payment Voucher

Important Information

Use this voucher only if making your payment after you file your MI-1040 return.

Do not use this voucher to do any of the following:

- Make any other payments to the State of Michigan
- Make estimated income tax payments. Estimated income tax payments should be made using the MI-1040ES
- Pay tax owed on your City of Detroit return. The City of Detroit tax due should be paid using the CITY-V.

Failure to provide a complete Social Security number on Form MI-1040-V will result in processing delays.

Enter on Form MI-1040-V below the tax due as shown on your *Individual Income Tax Return* (MI-1040), line 33.

Your payment and MI-1040-V are due April 15, 2021. If your payment is late, you will owe interest and penalty in addition to the tax due. The annual interest rate is 1 percent above the current prime rate. Penalty is 5 percent of the tax due for the first two months, then 5 percent for each month thereafter until the full payment is received, up to a maximum penalty of 25 percent. If you pay late, you may calculate and add interest and penalty to your payment or Treasury will send you a bill for any additional amount due. Interest rates are adjusted on July 1 and January 1. For current interest rates visit www. michigan.gov/taxes.

If you do not owe any tax on your MI-1040, do not file this form.

Electronic Payments

You may choose to make your individual income tax payment electronically. Paying electronically is easy, fast and secure. Payment options include direct debit (eCheck) from your checking or savings account, or payment by credit or debit card.

You can also make your Individual Income Tax payment using direct debit when supported by your e-file software provider.

If you choose to make your payment electronically, you do not need to mail the MI-1040-V to Treasury. Visit www.michigan.gov/iit for more information.

Mailing Instructions

- Make your check payable to the "State of Michigan."
 Print "2020 MI-1040-V" and the last four digits of your
 Social Security number on the check. If paying on behalf
 of another filer, write the filer's name and the last four
 digits of the filer's Social Security number on the check.
- Detach Form MI-1040-V along the dotted line.
- Do not attach your payment to Form MI-1040-V. Instead, place both items loose in the envelope and mail to:

Michigan Department of Treasury P.O. Box 30774 Lansing, MI 48909

- Do not attach a copy of your return to the MI-1040-V.
 Attaching a copy of your return will delay the application of payment to your account.
- Do not write notes on the MI-1040-V or submit the voucher without payment.
- If you mail your payment with your paper filed return, you do not need to mail the MI-1040-V to Treasury.

If you have questions, you may call 517-636-4486. Assistance is available using TTY through the Michigan Relay Service by calling 711.

Visit www.michigan.gov/taxes for additional information.



Mail this form with payment for your MI-1040 return. Do not file with your paper return.

Detach here and mail with your payment. Do not fold or staple the voucher.

Michigan Department of Treasury (Rev. 03-20)

2020 MICHIGAN Individual Income Tax Payment Voucher

MI-1040-V

Issued under authority of Public Act 281 of 1967, as amended. See instructions for filing guidelines.

Mail Form MI-1040-V with your payment after you file your MI-1040 return. Do not use this form to make any other payments to the State of Michigan.

Filer's Name(s) (First, Middle Initial, Last) and Home Address (Street, City, State, ZIP Code)	Filer's Full Social Security Number 111-22-3333	Spouse's Full Social Security Number
TOOL CHECK	WRITE PAYMENT AMOUNT HERE	\$ 11.00
1234 WASHTENAW AVE APT 3 YPSILANTI MI 48197	MAIL TO: Michigan Department of Treasury P.O. Box 30774 Lansing, MI 48909	Make check payable to "State of Michigan." Write the last four digits of filer's Social Security number and "2020 MI-1040-V" on the check. Do not fold or staple.

DO NOT WRITE IN THIS SPACE