

Part I – General Questions for All Returns			
Yes	No	Unsure	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. At any time during 2023, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. At any time during 2023, did you (a) receive (as a gift, reward, or payment for property or services) or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or financial interest in a digital asset) e.g., Bitcoin, or other “virtual currency” ?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. During 2023, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Did you make purchases on the internet, or by mail order from out-of-state companies on which you DID NOT pay Michigan Sales Tax?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Are you or your spouse if married, legally blind? <input type="checkbox"/> I am <input type="checkbox"/> My Spouse is
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Did you give more than \$17,000 to any one individual during 2023
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Did you (or your spouse if married) renew your driver’s license in 2023. If yes, please bring your new license(s) with you to your drop off appointment.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. Do you exercise controlling interest in any corporation or Limited Liability Company or LLC?
Part II – Your Income			
In 2023, did you (or your spouse, if married), RECEIVE			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. Wages or salary? (Provide W-2 Forms)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. Tip Income?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. Scholarships?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. Interest/Dividends? From: checking/savings accounts, bonds, CDs, brokerage firms (Forms 1099-INT, 1099-DIV, 1099-OID) etc.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12. Self-employment income or loss (such as earnings from contract labor or your own small business? (Please provide detailed records of income and expense)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13. Income or loss on the sale of stocks, bonds, or real estate (including your home) provide any Forms 1099-B or 1099-S
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13a. Did you receive Unemployment Benefits in 2023? Provide Form 1099-G
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14. Disability income (such as payments from SSA, VA, insurance, etc.) include any Forms 1099-R
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15. Distributions from pensions, annuities, or IRAs (provide any Forms 1099-R)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16. Social Security or Railroad Retirement Benefits (provide Forms SSA-1099)
			Reserved for future use
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	17. Income from a rental property (provide detailed records of income and expense)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	18. Other income (gambling, lottery, prizes, awards, jury duty etc.) Specify _____ Provide Forms W-2G, 1099-MISC+

Part III — Life Events & Other Considerations			
During 2023, did you or your spouse			
<input type="checkbox"/>	<input type="checkbox"/>		19. Did your spouse die during the year? Date of death:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20. Has there been a change in the number of dependents you can claim? Did you have a child, or are you losing a dependent because he or she is over 19 or a student and over 24?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21. Make contributions to a retirement account <input type="checkbox"/> IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> 401(k) <input type="checkbox"/> Other _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	22. Did you pay alimony during 2023. If yes, provide former spouse's Social Security Number and the date of your divorce. SSN - - Divorced / /
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23. Have a Health Savings Account? (HSA) (Form 5498-SA or 1099-SA)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24. Have a debt from a mortgage or credit card <u>cancelled or forgiven</u> by the lender? (Form 1099-C or 1099-A)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	25. Have an Earned Income Credit (EIC) disallowed in a previous year? What year _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	26. Pay any student loan interest?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	27. Buy a home?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28. Did you make estimated tax payments or apply last year's refund to your 2023 tax?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29. If you are due a refund, do you want Direct Deposit? (provide a voided check)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30. If you have balance due, do you want to pay by Direct Debit? (provide a voided check)

In 2023, did you, or your spouse, if married, PAY:
(Check Yes, No, or Unsure to all questions below)

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

If you think you may be able to itemize your deductions, please complete the checklist below. These deductions have to exceed \$13,850 if you are single or \$27,700 if you are married filing a joint return. 65 and older the amounts are \$15,700 and \$30,300 respectively.

Taxpayer Signature

Spouse Signature, if married.

Date signed

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