

QUESTIONS SPECIFIC FOR MICHIGAN

1. School District Name: _____ School District Number: _____
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2. Would you like to donate \$3 of your taxes to the State Campaign Fund? (This will not reduce your refund)
Taxpayer : **YES / NO** Spouse: **YES / NO**
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3. If you itemized on your Federal Return (last year) and received a MI state refund, was any part of that refund from the MI homestead property tax credit or Adoption Credit? **YES / NO** **If YES**, how much of it was due to either of these credits? _____
(You should be issued a MI 1099 G if you itemized, but Box B Refund will not include above credits and they are taxable on Federal this year.)
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4. Did you / your spouse contribute to a MI Education Savings Program (MESP) or a MI Education Trust (MET) in 2008? **YES / NO**
If YES, MESP contribution amount: _____ MET contribution amount: _____
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5. City Income Tax Credit
A. Did you pay any city tax on your city income tax return filed in 2008? **YES / NO** **IF YES**, amount paid \$_____
B. Did you make any estimated city income tax payments in 2008? **YES / NO** **IF YES**, amount paid \$_____
C. Did you receive any city income tax refund in 2008? **YES / NO** **IF YES**, amount received \$_____.
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6. Did you / your spouse pay any MI College Tuition and Fees in 2008? **YES / NO** **If YES**, complete the following:(only certain institutions apply)
- | Student Name | SSN | Name of College/University | Amount (for undergrad) Paid |
|---------------------|-----------------------|-----------------------------------|------------------------------------|
| _____ | _____ - _____ - _____ | _____ | _____ |
| _____ | _____ - _____ - _____ | _____ | _____ |
| _____ | _____ - _____ - _____ | _____ | _____ |
- Is anyone else contributing to undergraduate tuition and fees for the student(s) listed above? **YES / NO** **If YES**, please list name and address of the other contributor: _____
(Paid Preparer may be contacting you for additional information)
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7. Would you / your spouse like to contribute to any of the following voluntary funds? (This will reduce your refund)
YES / NO **If YES**, please fill in amount:
Military Family Relief Fund (minimum \$1.00) _____ Children's Trust Fund (minimum \$5.00) _____
Children of Veterans Tuition Grant Program (minimum \$2.00) _____
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8. Michigan's Use Tax Did you purchase any items or service from an out-of-state retailer (such as from a catalog or over the internet) or while traveling in a foreign country, and pay no tax? **YES / NO** **IF YES**, total amount of purchases made in 2008 _____

9. Homestead Property Tax Credit – please complete the following. *(Paid Preparer may be contacting you for additional information concerning this credit)*

- A. In 2008, was your permanent homestead located in Michigan? **YES / NO**
- B. Were you a Michigan resident for at least six months of 2008? **YES / NO**
- C. Did you pay property taxes on your Michigan homestead in 2008? **YES / NO**
IF YES, amount paid \$_____, and the 2008 taxable value of your homestead \$_____.
- D. Did you pay rent on your Michigan homestead in 2008? **YES / NO**

IF YES, please complete the following:

Complete Address of Homestead you Rented	Landowner's Name and Address	# of Months Rented	Monthly Rent	Total Rent Paid

- E. Were you an occupant of housing on which service fees are paid instead of taxes? **YES / NO**
IF YES, enter total amount of rent you paid in 2008 \$_____
- F. Were you a mobile park resident? **YES / NO**
IF YES, enter the total amount of rent you paid in 2008 \$_____

10. Do you *(think you may) qualify for the MI Home Heating Credit (MI-1040CR-7)? **YES / NO**
IF YES, a paid preparer will be contacting you for additional information. Best Phone # to reach you at: (___ ___) ___ ___ - ___ ___
This is a separate credit that has nothing to do with the Michigan State 1040 Return

<u>Standard Allowance:</u>			<u>Maximum Income for Alternate Credit</u>	
Exemptions	Standard Allowance	Maximum Income	Exemptions	Maximum Income
0-1	\$394	\$11,243	0-1	\$12,263
2	\$528	\$15,072	2	\$16,502
3	\$662	\$18,900	3	\$20,282
4	\$796	\$22,729		
5	\$930	\$26,558		
6	\$1,064	\$30,386		

- 11. Were you / your spouse called out on Active Military duty? **YES / NO**
If Yes, Date of Deployment: ___ / ___ / ___ **Place of Deployment:** _____
- 12. Is there any other information you think we should know, credits you feel you are eligible for, or any other questions you have?
YES / NO **IF YES**, what would you like to add? _____