
YOUR TAX PROFESSIONAL TODAY:

Sandra Villanueva
800-472-5625
1301 Main St Ste 101B
Kansas City, MO, 64105

WE'RE OPEN YEAR-ROUND:

Call 800-472-5625
Visit hrblock.com/myblock.
Download the MyBlock App.

HOW WE MINIMIZED WHAT YOU OWE:

Since you made contributions to a qualified retirement plan through your employer with pretax dollars, we were able to reduce your taxes by: \$508.64

In total, we reduced your tax liability by: \$508.64

Because I helped you get all the deductions and credits you are entitled to, you paid 12% of your total income in taxes. This is your Effective Tax Rate for 2021.

YOUR TAX PREPARATION AND RELATED FEES:

Tax Preparation: \$204.97
Coupons and Prior Payments: (\$204.97)
Total: \$0.00

WHAT YOU CAN EXPECT:

Michigan State Refund: \$204.00
Federal Balance Due : \$1,553.00
See below for balance due instructions

WHAT YOU NEED TO KNOW:

To check the status of your return, visit hrblock.com/myreturnstatus or call 866-761-1040. You'll need your Social Security number and date of birth.

Refund: Federal and State refund timing varies. Delivery of your Federal refund may be delayed if the IRS selects your return for further review. The Department of Treasury Offset Program may offset your tax refund to pay delinquent federal student loans, child support or other debt. Call the Treasury Offset Program Call Center at 800-304-3107 if you have questions.

Balance Due: If you have a Federal balance due and did not make arrangements today to pay the full amount, go to DirectPay at IRS.gov or mail-in a check to pay the remaining balance by April 18. If you pay by credit/debit card, payment processor will assess a convenience fee. No part of this service fee goes to H&R Block. If you selected an installment plan, visit IRS.gov to apply for an online payment agreement. If you have a State balance due and did not make arrangements today to pay the full amount, you can pay the remaining balance by credit/debit card or check. Follow state instructions to avoid additional penalties/fees.

Bank Account Information: The bank account that will be used for your federal refund and/or balance due is:
Routing Transit Number (RTN):272483808 Deposit Account Number (DAN):XX1019 Withdrawal Date:06/25/2022

Extension: If you filed an extension, the original return must be filed by October 15. Any balance due must be paid by April 18 to avoid penalties/interest.

We're Open All Year! Call 800-HRBLOCK 800-472-5625 or visit hrblock.com to schedule an appointment.

FEDERAL TAX RETURN SUMMARY 2021

	Year 2021	Year 2020	Change(\$)
Income			
Wages, salaries, tips, etc.:	\$71,883	\$75,633	(\$3,750)
Interest income:	\$0	\$0	\$0
Ordinary dividend income:	\$88	\$0	\$88
Refunds of state and local taxes:	\$0	\$0	\$0
Business income or (loss) (Schedule C):	\$0	\$0	\$0
Capital gain or (loss) (Schedule D):	\$0	\$0	\$0
Other gains or (losses) (Form 4797):	\$0	\$0	\$0
IRA distributions and pension income:	\$0	\$0	\$0
Rental real estate, partnerships, estates, etc. (Schedule E):	\$0	\$0	\$0
Farm income or (loss) (Schedule F):	\$0	\$0	\$0
Unemployment compensation:	\$0	\$0	\$0
Taxable social security income:	\$0	\$0	\$0
Other income:	\$0	\$0	\$0
Total income:	\$71,971	\$75,633	(\$3,662)
Adjustments			
Student loan interest deduction:	\$0	\$212	(\$212)
Domestic production activities deduction:	\$0	\$0	\$0
IRA contributions:	\$0	\$0	\$0
Deductible part of self-employment tax:	\$0	\$0	\$0
Self-employed health insurance:	\$0	\$0	\$0
Self-employed SEP, SIMPLE, and qualified plans:	\$0	\$0	\$0
Other adjustments:	\$0	\$0	\$0
Charitable contributions if taking standard deduction:	\$0	N/A	\$0
Total Adjustments:	\$0	\$212	(\$212)
Adjusted Gross Income (AGI)			
This is your total income less total adjustments:	\$71,971	\$75,421	(\$3,450)
Deductions			
Itemized/Standard Deductions:	\$12,550	\$12,400	\$150
Medical and dental expenses:	\$0	\$0	\$0
Taxes paid:	\$3,055	\$0	\$3,055
Interest paid:	\$3,165	\$0	\$3,165
Gifts to charity:	\$0	\$0	\$0
Casualty and theft losses:	\$0	\$0	\$0
Other miscellaneous deductions:	\$0	\$0	\$0
Qualified business income deduction:	\$0	\$0	\$0
Tax Computation			
Tax:	\$8,812	\$9,656	\$0
Alternative minimum tax:	\$0	\$0	\$0
Excess Advance Premium Tax Credit Repayment:	\$0	\$0	\$0
Other Taxes			
Self-employment tax:	\$0	\$0	\$0
Other Taxes:	\$0	\$0	\$0
Total Taxes:	\$8,812	\$9,656	(\$844)

Credits

We're Open All Year! Call 800-HRBLOCK 800-472-5625 or visit hrblock.com to schedule an appointment.

Child and other dependents tax credit:	\$0	\$0	\$0
Foreign tax credit:	\$0	\$0	\$0
Child Care Credit:	\$0	\$0	\$0
Other Credits:	\$0	\$0	\$0
Total Credits:	\$0	\$0	\$0

Payments

Federal income tax withheld:	\$7,273	\$8,137	(\$864)
Estimated payments:	\$0	\$0	\$0
Earned Income Credit:	\$0	\$0	\$0
Recovery rebate credit:	\$0	N/A	\$0
Qualified sick and family leave credit:	\$0	N/A	\$0
Deferral for certain Schedule H or Schedule SE filers:	\$0	N/A	\$0
Other Payments:	\$0	\$0	\$0
Total Payments:	\$7,273	\$8,137	(\$864)

Balance Due

Amount overpaid:	\$0	\$0	\$0
Overpayment applied to next year:	\$0	\$0	\$0
Refund:	\$0	\$0	\$0
Amount Due:	\$1,553	\$1,519	\$34
Penalty:	\$14	\$0	\$14

Other Computations

Marginal tax bracket:	22%
Effective tax Rate:	12%
Filing Status:	SINGLE

SINGLE	Tax Bracket
\$0 - \$9,950	10%
\$9,950 - \$40,525	12%
\$40,525 - \$86,375	22%
\$86,375 - \$164,925	24%
\$164,925 - \$209,425	32%
\$209,425 - \$523,600	35%
\$523,600 or greater	37%

--\$9,950 of your income was taxed at 10%
 --\$30,575 of your income was taxed at 12%
 --\$18,896 of your income was taxed at 22%



Your effective tax rate is 12%
 You paid \$8,812 in federal income taxes

We're Open All Year! Call 800-HRBLOCK 800-472-5625 or visit hrblock.com to schedule an appointment.

We stand behind our work.



Maximum Refund Guarantee¹

We'll get you the largest refund to which you're entitled or your tax preparation is free. No one can get you a bigger refund than H&R Block - guaranteed.



100% Accuracy Guarantee

If we make an error on your return, we'll pay any penalties and interest due to our error.



Tax Notice Services²

If we made an error on your tax return, we'll address the resulting letter at no additional cost.

24/7 access to your info

Log in to your personalized MyBlock account anytime, anywhere, to:

- Check your e-file return status
- View your tax returns
- Review your tax checklist
- Share tax docs with your Tax Pro
- Access your Emerald Card[®]
- Go paperless with digital docs

hrblock.com/myblock

We're here all year.

Our experienced tax pros are available by appointment to help in person all year long.

Call 800-HRBLOCK
(800-472-5625) or visit
hrblock.com to schedule
an appointment.

¹ Refund claims must be made during the calendar year in which the return was prepared. Amendment included at no additional charge.

² H&R Block will explain the position taken by the IRS or other taxing authority and assist you in preparing an audit response. Does not include in person Audit Representation.

2022 INCOME TAX ESTIMATOR/PLANNER

MICHAEL R
MCDERMOTT

Keep for Your Records

	Current 2021	Adjustments 2022	Estimated 2022
Filing status	<u>SINGLE</u>		<u>SINGLE</u>
INCOME:			
Wages, salaries, tips, etc.	71,883		71,883
Interest income			
Ordinary dividend income (excluding Qualified Dividends)	5		5
IRA distributions and pension income			
Taxable social security income			
Capital gain or (loss) (Schedule D) (including Qual Dividends)	83		83
Schedule 1 Income			
Refunds of state and local taxes			
Alimony received from divorces finalized before 1/1/2021			
Business income or (loss) (Schedule C)			
Other gains or (losses) (Form 4797)			
Rental real estate, partnerships, estates, etc. (Schedule E)			
Farm income or (loss) (Schedule F)			
Unemployment compensation			
Other income			
Total income	71,971		71,971
ADJUSTMENTS:			
Schedule 1 Adjustments			
Educator expenses			
Certain business expenses of reservists, performing artist, and fee-basis government officials			
Health savings account deduction (Form 8889)			
Qualified moving expenses			
Deductible part of self-employment tax (Schedule SE)			
Self-employed SEP, SIMPLE and qualified plans deduction ..			
Self-employed health insurance			
Penalty on early withdrawal of savings			
Alimony paid on divorces finalized before 1/1/2021			
IRA deduction			
Student loan interest deduction			
Other adjustments			
Total adjustments			
ADJUSTED GROSS INCOME:	71,971		71,971
DEDUCTIONS:			
Standard deduction	12,550	400	12,950
Itemized deductions:			
Medical and dental expenses			
Sales, income, and other taxes paid	3,055		3,055
Interest paid	3,165		3,165
Gifts to charity			
Casualty and theft losses			
Other miscellaneous deductions			
Total itemized deductions	6,220		6,220
Deduction actually claimed	12,550	400	12,950
Qualified business income deduction			

2022 INCOME TAX ESTIMATOR/PLANNER

MICHAEL R
MCDERMOTT

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	Current 2021	Adjustments 2022	Estimated 2022
TAX COMPUTATION (BEFORE CREDITS):			
Taxable income	59,421	-400	59,021
Tax	8,812	-209	8,603
Schedule 2 - Taxes			
Alternative minimum tax	_____	_____	_____
Excess advance premium tax credit repayment	_____	_____	_____
Tax rate	22%	_____	22%
CREDITS:			
Child and other dependents tax credit	_____	_____	_____
Schedule 3 - Nonrefundable Credits			
Foreign tax credit	_____	_____	_____
Child care credit	_____	_____	_____
Education credit	_____	_____	_____
Retirement savings contribution credit	_____	_____	_____
Other credits	_____	_____	_____
Total credits	_____	_____	_____
OTHER TAXES:			
Schedule 2 - Other Taxes			
Self-employment tax	_____	_____	_____
Additional tax on IRAs	_____	_____	_____
Health Care (Individual Responsibility) (repealed after 2019)	_____	_____	Not Applicable
Other taxes	_____	_____	_____
Total other taxes	_____	_____	_____
PAYMENTS:			
Federal income tax withheld	7,273	_____	7,273
Earned income credit	_____	_____	_____
Additional child tax credit	_____	_____	_____
Schedule 3 - Refundable Credits and Payments			
Estimated payments	_____	_____	_____
American opportunity credit	_____	_____	_____
ACA premium tax credit	_____	_____	_____
Other payments	_____	_____	_____
Total payments	7,273	_____	7,273
AMOUNT DUE / REFUND:			
Amount overpaid	_____	_____	_____
Overpayment applied to next year	_____	_____	_____
Refund	_____	_____	_____
Amount due	1,539	-209	1,330

Note: These amounts and calculations are for estimating purposes only and should not be assumed to be your final refund or liability for 2021 taxes. State implications have not been considered in these calculations. Be sure to schedule a tax appointment to have your 2021 tax return prepared using the actual 2021 tax forms issued by the Internal Revenue Service and your actual 2021 source documents.

ADDITIONAL DISCLOSURES:

THE MORTGAGE INTEREST DEDUCTION FOR ANY QUALIFIED RESIDENCE ACQUIRED AFTER DECEMBER 15, 2017 IS LIMITED TO INTEREST ON THE FIRST \$750,000 (\$375,000 FOR MFS) OF THE MORTGAGE. LOANS FINANCED BEFORE THAT DATE ARE STILL SUBJECT TO THE \$1,000,000 (\$500,000) LIMIT FROM PRIOR LAW. FOR TAX YEARS AFTER 2021 HOME EQUITY DEBT WILL NO LONGER BE DEDUCTIBLE AS QUALIFIED RESIDENCE INTEREST.

2022 INCOME TAX ESTIMATOR/PLANNER
R

MICHAEL
MCDERMOTT

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ADDITIONAL DISCLOSURES:

SUBJECT TO AN ADJUSTED WITHHOLDING ENTRY, THE 2021 WITHHOLDING IS BEING USED TO CALCULATE THE 2022 ESTIMATED TAX REFUND OR BALANCE DUE. BEGINNING IN JANUARY 2022 THE IRS HAS CHANGED THE WAY W4 SHOULD BE PREPARED REPORTING EXTRA INCOME, DEDUCTIONS AND CREDITS RATHER THAN EXEMPTION COUNTS. THESE CHANGES MIGHT CAUSE SOME CHANGE IN WITHHOLDING. ADVISE CLIENT THAT EMPLOYERS MAY REQUIRE A NEW W4 BE FILED UNDER THE NEW FORMAT.

HRB TAX GROUP INC
1301 MAIN ST STE 101B
KANSAS CITY MO 64105
8004725625

06-25-2022

MICHAEL MCDERMOTT

INSTRUCTIONS FOR FILING 2021 FEDERAL FORM 1040/1040-SR

- .Your return has a balance due of \$1,553.00. (Penalty Incl)
 - .You have elected to file your Federal return ELECTRONICALLY.
 - .You have entered a PIN for your signature.
 - .You have elected EFW from your bank account on 06-25-2022.
 - .DO NOT MAIL A PAPER COPY OF YOUR RETURN TO THE IRS.
-

INSTRUCTIONS FOR FILING 2021 MICHIGAN FORM MI-1040

- .You will receive a refund of \$204.00.
- .You have elected to file your State return ELECTRONICALLY.
- .Michigan accepts the Federal PIN signature(s), no 8453 is required.
- .DO NOT MAIL A PAPER COPY OF YOUR RETURN TO MICHIGAN.

Filing Status Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW)
 Check only 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 one box. qualifying person is a child but not your dependent ▶

Your first name and middle initial MICHAEL R	Last name MCDERMOTT	Your social security number
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. 652 FOREST ST		Apt. no.	Presidential Election Campaign 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.
City, town, or post office. If you have a foreign address, also complete spaces below. WESTLAND	State MI	ZIP code 48186	
Foreign country name	Foreign province/state/county	Foreign postal code	

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of 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, 1957 Are blind Spouse: Was born before January 2, 1957 Is blind

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see inst.):	
(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"/>					

	1	Wages, salaries, tips, etc. Attach Form(s) W-2		71,883
Attach Sch. B if required.	2a	Tax-exempt interest	2b	Taxable interest
	3a	Qualified dividends 83	3b	Ordinary dividends 88
	4a	IRA distributions	4b	Taxable amount
Standard Deduction for- • Single or Married filing separately, \$12,550 • Married filing jointly or Qualifying widow(er), \$25,100 • Head of household, \$18,800 • If you checked any box under Standard Deduction, see instructions.	5a	Pensions and annuities	5b	Taxable amount
	6a	Social security benefits	6b	Taxable amount
	7	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	7	
	8	Other income from Schedule 1, line 10	8	
	9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	9	71,971
	10	Adjustments to income from Schedule 1, line 26	10	
	11	Subtract line 10 from line 9. This is your adjusted gross income	11	71,971
	12a	Standard deduction or itemized deductions (from Schedule A)	12a	12,550
	b	Charitable contributions if you take the standard deduction (see instructions)	12b	
	c	Add lines 12a and 12b	12c	12,550
	13	Qualified business income deduction from Form 8995 or Form 8995-A	13	
	14	Add lines 12c and 13	14	12,550
	15	Taxable income. Subtract line 14 from line 11. If zero or less, enter -0-	15	59,421

16 Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	16	8,812
17 Amount from Schedule 2, line 3	17	
18 Add lines 16 and 17	18	8,812
19 Nonrefundable child tax credit or credit for other dependents from Schedule 8812	19	
20 Amount from Schedule 3, line 8	20	
21 Add lines 19 and 20	21	
22 Subtract line 21 from line 18. If zero or less, enter -0-	22	8,812
23 Other taxes, including self-employment tax, from Schedule 2, line 21	23	
24 Add lines 22 and 23. This is your total tax	24	8,812
25 Federal income tax withheld from:		
a Form(s) W-2	25a	7,273
b Form(s) 1099	25b	
c Other forms (see instructions)	25c	
d Add lines 25a through 25c	25d	7,273
26 2021 estimated tax payments and amount applied from 2020 return	26	
27a Earned income credit (EIC). Check here if you were born after January 1, 1998, and before January 2, 2004, and you satisfy all the other requirements for taxpayers who are at least age 18, to claim the EIC. See instructions ... <input type="checkbox"/>	27a	
b Nontaxable combat pay election	27b	
c Prior year (2019) earned income	27c	
28 Refundable child tax credit or additional child tax credit from Schedule 8812	28	
29 American opportunity credit from Form 8863, line 8	29	
30 Recovery rebate credit. See instructions.	30	
31 Amount from Schedule 3, line 15	31	
32 Add lines 27a and 28 through 31. These are your total other payments and refundable credits	32	
33 Add lines 25d, 26, and 32. These are your total payments	33	7,273
Refund 34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	
35a Amount of line 34 you want refunded to you . If Form 8888 is attached, check here <input type="checkbox"/>	35a	
b Routing number	c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	
d Account number		
36 Amount of line 34 you want applied to your 2022 estimated tax	36	
Amount 37 Amount you owe . Subtract line 33 from line 24. For details on how to pay, see instructions	37	1,553
You Owe 38 Estimated tax penalty (see instructions)	38	14

If you have a qualifying child, attach Sch. EIC.

Third Party Designee Do you want to allow another person to discuss this return with the IRS? See instructions ... **Yes**. Complete below. **No**

Designee's name **HRB TAX GROUP INC** Phone no. **800-472-5625** Personal identification number (PIN)

Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation RECRUITER	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) <input type="text"/>
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) <input type="text"/>

Phone no. 734-890-2146 Email address MRMCDERMOTT87@HOTMAIL.COM

Paid Preparer Use Only

Preparer's name SANDRA VILLANUEVA	Preparer's signature	Date 06-25-2022	PTIN P01307042	Check if: <input type="checkbox"/> Self-employed
Firm's name HRB TAX GROUP INC	Firm's address 1301 MAIN ST STE 101B KANSAS CITY MO 64105			Phone no. 800-472-5625
				Firm's EIN 431871840

2021 WAGES AND SALARIES SUMMARY ATTACHMENT

MICHAEL R
MCDERMOTT

Employer Name	Employer EIN	T or S	Wages	Federal Withholding	Social Security Tax Withheld	State	State Wages	State Tax Withheld	Local Tax Withheld
SUN COMMUNITIES	38-3144240	T	54,352	5,842	3,513	MI	54,352	2,310	
CITY OF WESTLAND	38-1810301	T	17,531	1,431	1,087	MI	17,531	745	
TOTAL			71,883	7,273	4,600		71,883	3,055	

2021 FEDERAL TAX WITHHOLDINGS ATTACHMENT

MICHAEL R
MCDERMOTT

W-2	SUN COMMUNITIES	5,842
W-2	CITY OF WESTLAND	1,431
TOTAL TO FORM 1040/1040-SR LINE 25D		7,273

2021 QUALIFIED DIVIDENDS and CAPITAL GAIN TAX WORKSHEET – LINE 16

MICHAEL R MCDERMOTT

MICHAEL R MCDERMOTT

Keep for Your Records

- Before you begin:** ✓ See the instructions for line 16 in the instructions to see if you can use this worksheet to figure your tax.
 ✓ Before completing this worksheet, complete Form 1040 or 1040-SR through line 15.
 ✓ If you do not have to file Schedule D and you received capital gain distributions, be sure you checked the box on Form 1040 or 1040-SR, line 7.

1. Enter the amount from Form 1040 or 1040-SR, line 15. However, if you are filing Form 2555 (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	59,421
2. Enter the amount from Form 1040 or 1040-SR, line 3a*	2.	83
3. Are you filing Schedule D?*		
Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or line 16 is blank or a loss, enter -0-	3.	0
No. Enter the amt from Fm 1040 or 1040-SR, ln 7.		
4. Add lines 2 and 3	4.	83
5. Subtract line 4 from line 1. If zero or less, enter -0-	5.	59,338
6. Enter: \$40,400 if single or married filing separately, \$80,800 if married filing jointly or qualifying widow(er), \$54,100 if head of household.	6.	40,400
7. Enter the smaller of line 1 or line 6	7.	40,400
8. Enter the smaller of line 5 or line 7	8.	40,400
9. Subtract line 8 from line 7. This amount is taxed at 0%	9.	
10. Enter the smaller of line 1 or line 4	10.	83
11. Enter the amount from line 9	11.	0
12. Subtract line 11 from line 10	12.	83
13. Enter: \$445,850 if single, \$250,800 if married filing separately, \$501,600 if married filing jointly or qualifying widow(er), \$473,750 if head of household.	13.	445,850
14. Enter the smaller of line 1 or line 13	14.	59,421
15. Add lines 5 and 9	15.	59,338
16. Subtract line 15 from line 14. If zero or less, enter -0-	16.	83
17. Enter the smaller of line 12 or line 16	17.	83
18. Multiply line 17 by 15% (0.15)	18.	12
19. Add lines 9 and 17	19.	83
20. Subtract line 19 from line 10	20.	0
21. Multiply line 20 by 20% (0.20)	21.	0
22. Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet	22.	8,800
23. Add lines 18, 21, and 22	23.	8,812
24. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	24.	8,822
25. Tax on all taxable income. Enter the smaller of line 23 or line 24. Also include this amount on the entry space on Form 1040 or 1040-SR, line 16. If you are filing Form 2555, don't enter this amount on the entry space on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	25.	8,812

* If you are filing Form 2555, see the footnote in the Foreign Earned Income Tax Worksheet before completing this line.

2021 FORM 2210 UNDERPAYMENT PENALTY WORKSHEET

MICHAEL R MCDERMOTT

Due Date	PAYMENT ALLOCATION				Total
	4/15/2021	6/15/2021	9/15/2021	1/15/2022	
Required Installment	1,983	1,983	1,983	1,982	7,931
WITHHOLDING	4/15/2021	1,818			1,818
WITHHOLDING	6/15/2021	165			165
WITHHOLDING	6/15/2021		1,653		1,653
WITHHOLDING	9/15/2021		330		330
WITHHOLDING	9/15/2021			1,488	1,488
WITHHOLDING	1/15/2022			495	495
WITHHOLDING	1/15/2022				1,324
BALANCE DUE	4/18/2022				658
TOTAL PAYMENTS	4/18/2022	1,983	1,983	1,983	1,982

PENALTY CALCULATION							
Transaction	Date	Beginning Balance	Amount	Adjusted Balance	Days Late	Interest Rate	Penalty*
FIRST INSTALLMENT 4/15/2021							
REQUIRED INSTALLMENT	4/15/2021		1,983	1,983			
WITHHOLDING	4/15/2021	1,983	1,818	165			
WITHHOLDING	6/15/2021	165	165		61	3	1
TOTAL 1ST QTR PENALTY							1
SECOND INSTALLMENT 6/15/2021							
REQUIRED INSTALLMENT	6/15/2021		1,983	1,983			
WITHHOLDING	6/15/2021	1,983	1,653	330			
WITHHOLDING	9/15/2021	330	330		92	3	3
TOTAL 2ND QTR PENALTY							3
THIRD INSTALLMENT 9/15/2021							
REQUIRED INSTALLMENT	9/15/2021		1,983	1,983			
WITHHOLDING	9/15/2021	1,983	1,488	495			
WITHHOLDING	1/15/2022	495	495		122	3	5
TOTAL 3RD QTR PENALTY							5
FOURTH INSTALLMENT 1/15/2022							
REQUIRED INSTALLMENT	1/15/2022		1,982	1,982			
WITHHOLDING	1/15/2022	1,982	1,324	658			
BALANCE DUE	4/18/2022	658	658		93	3	5
TOTAL 4TH QTR PENALTY							5
TOTAL PENALTY							14

*Penalty = Amount x Interest Rate x (Days Late / 365 (or 366 if it is a leap year))

2022 CARRYFORWARD INFORMATION

MICHAEL R
MCDERMOTT

Keep for Your Records

Itemized Returns Only – 2021 state and local tax refund (this amount may not be taxable in 2022)	_____
Charitable contributions carryover to 2022	_____
Estimated short-term capital loss carryover	_____
Estimated long-term capital loss carryover	_____
2021 tax liability (for 2022 Form 2210 purposes)	<u>8,812</u>
Form 8839: 2021 carryover of unqualified expenses	_____
Refund amount applied to 2022	_____
Disallowed investment interest in 2021	_____
Additional state taxes paid	_____
Form 8396: Mortgage interest credit from 2019	_____
Mortgage interest credit from 2020	_____
Mortgage interest credit from 2021	_____
Form 8801: Minimum tax credit carryforward	_____
Potential 2022 IRA contribution from 2021 tax refund	_____

NOL carryforward:		Regular Tax		AMT Tax			
from 2001	_____	from 2011	_____	from 2001	_____	from 2011	_____
from 2002	_____	from 2012	_____	from 2002	_____	from 2012	_____
from 2003	_____	from 2013	_____	from 2003	_____	from 2013	_____
from 2004	_____	from 2014	_____	from 2004	_____	from 2014	_____
from 2005	_____	from 2015	_____	from 2005	_____	from 2015	_____
from 2006	_____	from 2016	_____	from 2006	_____	from 2016	_____
from 2007	_____	from 2017	_____	from 2007	_____	from 2017	_____
from 2008	_____	from 2018	_____	from 2008	_____	from 2018	_____
from 2009	_____	from 2019	_____	from 2009	_____	from 2019	_____
from 2010	_____	from 2020	_____	from 2010	_____	from 2020	_____
Gross NOL generated in 2021	_____	Gross AMT NOL generated in 2021	_____				
To be absorbed in carryback period	_____	To be absorbed in carryback period	_____				
Net carryforward from 2021	_____	Net carryforward from 2021	_____				
Total carryforward to 2022	_____	Total carryforward to 2022	_____				

- The amounts carried to next year from Schedule(s) E, pages 1 and/or 2, are found on Form 8582, Worksheet 6. Carryover AMT amounts are found on the AMT Form 8582, Worksheet 6.
- Foreign Tax Credit carryforward to 2022
- General Business Credit carryforward to 2022
- First-Time Homebuyer Credit Repayment carryforward to 2022
- If there are Form(s) 6252 in this tax return, the gross profit ratio and prior payments received (including the current year payments) will carry forward from each Form 6252.
- Amounts from Form 6251, lines 16 through 18, lines 27 and 28 are automatically carried forward to 2022.

MI 2021 TAX FOR 2022 UNDERPMT PENALTY FORM.....	2,851
MI STATE & LOCAL REFUND TO REPORT ON 2022 1040....	204

2021 MICHIGAN TWO YEAR COMPARISON

Taxpayer's Last and First Name

**MICHAEL R
MCDERMOTT**

Keep For Your Records

	Tax Year 2021	Tax Year 2020	Difference
Filing status	SINGLE		
Residency status	RESIDENT		
Number of exemptions claimed	1		
State Base Form Filed	MI 1040		

INCOME, DEDUCTIONS AND ADJUSTMENTS:

Federal Adjusted Gross Income	71,971		71,971
Additions to Federal Income			
Subtractions from Federal Income			
Michigan Income	71,971		71,971
Exemption Amount (Allowance) / Personal Exemptions	4,900		4,900
Taxable Income	67,071		67,071

TAX, CREDIT AND PAYMENTS:

Michigan Tax	2,851		2,851
Credit for Taxes Paid to Another State			
Other Nonrefundable Credits			
Net Tax	2,851		2,851
Income Tax Withheld	3,055		3,055
Other Payments Including Refundable Credits			
Total Payments	3,055		3,055

REFUND OR BALANCE DUE

Underpayment Penalty			
Amount You Owe			
Overpayment	204		204
Overpayment Applied to Estimated Payments			
Amount to be Refunded	204		204

2021 MICHIGAN Individual Income Tax Return MI-1040

Amended Return
(Include Schedule AMD)

Return is due April 18, 2022. Type or print in blue or black ink.

1. Filer's First Name MICHAEL	M.I. R	Last Name MCDERMOTT	2. Filer's Full Social Security No. (Example: 123-45-6789)
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) 652 FOREST ST			4. School District Code (5 digits - see instructions) 82160
City or Town WESTLAND	State MI	ZIP Code 48186	
5. STATE CAMPAIGN FUND 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.		a. <input type="checkbox"/> Filer b. <input type="checkbox"/> Spouse	6. FARMERS, FISHERMEN, OR SEAFARERS <input type="checkbox"/> Check this box if 2/3 of your income is from farming, fishing, or seafaring.
7. 2021 FILING STATUS. Check one. a. <input checked="" type="checkbox"/> Single b. <input type="checkbox"/> Married filing jointly c. <input type="checkbox"/> Married filing separately*		* If you check box "c," complete line 3 and enter spouse's full name below: <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	
		8. 2021 RESIDENCY STATUS. Check all that apply. a. <input checked="" type="checkbox"/> Resident b. <input type="checkbox"/> Nonresident* c. <input type="checkbox"/> Part-Year Resident*	
* If you check box "b" or "c," you must complete and include Schedule NR.			

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.	<div style="border: 1px solid black; padding: 2px;">1</div>	x	\$4,900	9a.	4,900	00
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	\$4,900	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.	4,900	00
10. Adjusted Gross Income from your U.S. Form 1040 (see instructions)	10.					71,971	00
11. Additions from Schedule 1, line 9. Include Schedule 1.	11.						00
12. Total. Add lines 10 and 11.	12.					71,971	00
13. Subtractions from Schedule 1, line 29. Include Schedule 1.	13.						00
14. Income subject to tax. Subtract line 13 from line 12. If line 13 is greater than line 12, enter "0"	14.					71,971	00
15. Exemption allowance. Enter amount from line 9f or Schedule NR, line 19	15.					4,900	00
16. Taxable income. Subtract line 15 from line 14. If line 15 is greater than line 14, enter "0"	16.					67,071	00
17. Tax. Multiply line 16 by 4.25% (0.0425)	17.					2,851	00

NON-REFUNDABLE CREDITS

		AMOUNT		CREDIT
18. Income Tax Imposed by government units outside Michigan. Include a copy of the return (see instructions) 18a.		<div style="border: 1px solid black; padding: 2px;">00</div>	18b.	<div style="border: 1px solid black; padding: 2px;">00</div>
19. Michigan Historic Preservation Tax Credit carryforward (see instructions) 19a.		<div style="border: 1px solid black; padding: 2px;">00</div>	19b.	<div style="border: 1px solid black; padding: 2px;">00</div>
20. Income Tax. 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.				2,851 00

Filer's Full Social Security Number

--

21. Enter amount of Income Tax from line 20	21.	2,851	00
22. Voluntary Contributions from Form 4642, line 6. Include Form 4642	22.		00
23. USE TAX. Use tax due on Internet, mail order or other out-of-state purchases from Worksheet 1 (see instructions)	23.	0	00
24. Total Tax Liability. Add lines 21, 22 and 23	24.	2,851	00

REFUNDABLE CREDITS AND PAYMENTS

25. Property Tax Credit. Include MI-1040CR or MI-1040CR-2	25.		00
26. Farmland Preservation Tax Credit. Include MI-1040CR-5	26.		00
FEDERAL			
27. Earned Income Tax Credit. Multiply line 27a by 6% (0.06) and enter result on line 27b	27a.		00
MICHIGAN			
27b. Michigan Historic Preservation Tax Credit (refundable). Include Form 3581	27b.		00
28. Credit for allocated share of tax paid by an electing flow-through entity (see instructions)	28.		00
29. Michigan tax withheld from Schedule W, line 6. Include Schedule W (do not submit W-2s)	29.		00
30. Estimated tax, extension payments and 2020 credit forward	30.	3,055	00
31. 2021 AMENDED RETURNS ONLY. Taxpayers completing an original 2021 return should skip to line 33. Amended returns must include Schedule AMD (see instructions) .	31.		00
32a. <input type="checkbox"/> If you had a refund and/or credit forward on the original return, check box 32a and enter this amount as a negative number on line 32c.	32a.		
32b. <input type="checkbox"/> If you paid with the original return, check box 32b and enter the amount paid with the original return, plus any additional tax paid after filing, as a positive number on line 32c. Do not include interest or penalty.	32b.		
32c. Total refundable credits and payments. Add lines 25, 26, 27b, 28, 29, 30, 31 and 32c	32c.		00
33. Total refundable credits and payments. Add lines 25, 26, 27b, 28, 29, 30, 31 and 32c	33.	3,055	00

REFUND OR TAX DUE

34. If line 33 is less than line 24, subtract line 33 from line 24. If applicable, see instructions.	34.		00
Include interest <input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/> and penalty <input style="width: 40px;" type="text"/> <input style="width: 40px;" type="text"/>	34.	YOU OWE	00
35. Overpayment. If line 33 is greater than line 24, subtract line 24 from line 33	35.	204	00
36. Credit Forward. Amount of line 35 to be credited to your 2022 estimated tax for your 2022 tax return	36.		00
37. Subtract line 36 from line 35	37.	REFUND	204

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. <input checked="" type="checkbox"/> Checking 2. <input type="checkbox"/> Savings

Deceased Taxpayer. If Filer and/or Spouse died after December 31, 2020, enter dates below.
ENTER DATE OF DEATH ONLY. Example: 04-15-2021 (MM-DD-YYYY)

Filer		Spouse	
-------	--	--------	--

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
Spouse's Signature	Date

By checking this box, I authorize Treasury to discuss my return with my preparer.

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 P01307042
Preparer's Name (print or type) SANDRA VILLANUEVA
Preparer's Signature
Preparer's Business Name, Address and Telephone Number HRB TAX GROUP INC 1301 MAIN ST STE 101B KANSAS CITY MO 64105 8004725625

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

Michigan Department of Treasury, Lansing, MI 48956

Pay amount on line 34 (see instructions). Mail your check and return to:

Michigan Department of Treasury, Lansing, MI 48929

2021 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 2021, you must complete a Withholding Tax Schedule (Schedule W) to claim the withholding on your Individual Income Tax Return (MI-1040, line 30). 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 MICHAEL	M.I. R	Last Name MCDERMOTT	2. Filer's Full Social Security No. (Example: 123-45-6789)
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		B	C	D		E	
Enter "X" for: Filer or Spouse		Employer's identification number (Example: 38-1234567)	Box c -- Employer's name	Box 1 -- Wages, tips, other compensation		Box 17 -- Michigan income tax withheld	
X		38-3144240	SUN COMMUNITIES	54,352	00	2,310	00
X		38-1810301	CITY OF WESTLAND	17,531	00	745	00
					00		00
					00		00
					00		00
Enter Table 1 Subtotal from additional Schedule W forms (if applicable)							00
4. SUBTOTAL. Enter total of Table 1, column E						4.	3,055 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		B	C	D	E		
Enter "X" for: Filer or Spouse		Payer's federal identification number (Example: 38-1234567)	Payer's name	Taxable pension distribution, misc. income, etc. (see inst.)	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. SUBTOTAL. Enter total of Table 2, column E						5.	00
6. TOTAL. Add lines 4 and 5. Enter here and carry to MI-1040, line 30						6.	3,055 00