

2023 MICHIGAN Pension Schedule (Form 4884)

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

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.**

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) — —
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)
6a. <input type="checkbox"/> Check here if you received qualified retirement benefits earned from service by a fire, police, or county corrections retiree (see instructions to determine if you qualify).	
6b. <input type="checkbox"/> Check here if you were born after January 1, 1957, were retired as of January 1, 2013, and received retirement benefits from SSA exempt employment.	

PART 2: DECEASED SPOUSE INFORMATION

If you are receiving retirement and pension benefits from a deceased spouse, or are otherwise claiming the retirement and pension benefits subtraction based on your deceased spouse's year of birth, complete lines 7a through 7d.

7a. Deceased Spouse Name	7b. Deceased Spouse Full Social Security No.	7c. Deceased Spouse Year of Birth (ex. 19xx)
7d. <input type="checkbox"/> Check here if your deceased spouse was born after 1952, was retired as of January 1, 2013, and received retirement benefits from SSA exempt employment.		

PART 3: RETIREMENT AND PENSION BENEFITS (see instructions)

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

8. Retirement and pension benefits. List all that apply for filer (and spouse if filing jointly) including benefits from a deceased spouse.

A	B	C	D	E	F
Enter "X" for Private or Public	Enter "X" for Deceased Spouse	Payer FEIN (from 1099-R) (Example: 38-1234567) (see instructions)	Distribution Code	Name of Payer	Pension Amount Included in AGI
					00
					00
					00
					00
					00
					00
					00
					00
					00
					00

Check here and complete the *Michigan Pension Continuation Schedule (Form 4973)* if you have more than eight sources of Retirement and Pension Benefits.

Continue on page 2. This form cannot be processed if page 2 is not completed and included. You must also include a completed MI-1040 and Schedule 1 when filing Form 4884.

Filer's Full Social Security Number (Example: 123-45-6789) _____

PART 4: 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.

SECTION A:

9. Enter \$61,518 if single or \$123,036 if filing jointly	9.	00
10. Enter military retirement benefits due to service in the U.S. Armed Forces or Michigan National Guard, or taxable railroad retirement benefits included in AGI from Schedule 1, line 11	10.	00
11. Subtotal. Subtract line 10 from line 9. If line 10 is greater than line 9, enter "0"	11.	00
12. Enter total public retirement and pension benefits, including public benefits received from a deceased spouse who died prior to 2023	12.	00
13. Subtotal. Subtract line 12 from line 11. If line 12 is greater than line 11, enter "0"	13.	00
14. Enter total private retirement and pension benefits, including private benefits received from a deceased spouse who died prior to 2023	14.	00
15. Enter the smaller of lines 13 or 14	15.	00
16. Total Retirement and Pension Benefits Subtraction. Add lines 12 and 15. Carry this amount to Schedule 1, line 27	16.	00

SECTION B:

17. Total Retirement and Pension Benefits Subtraction. Enter total retirement and pension benefits, including benefits received from a deceased spouse who died prior to 2023 (maximum \$20,000 if single or \$40,000 if filing jointly). If you checked box 24C and/or 24G 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 27	17.	00
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SECTION C:

18. Total Retirement and Pension Benefits Subtraction. If you checked box 24C and/or 24G on Schedule 1 and the older of you or your spouse was born after December 31, 1958 but before January 2, 1962, 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 27	18.	00
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SECTION D:

19. Total Retirement and Pension Benefits Subtraction. Enter total retirement and pension benefits you received (maximum \$15,380 if single or \$30,759 if filing jointly). If you have military or railroad retirement benefits reported on Schedule 1, line 11, see instructions. Carry this amount to Schedule 1, line 27	19.	00
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