

Taxpayer Name:

ITEMS COMMONLY MISSED ON TAX RETURNS - PLACE A "✓/Amt" WHEN DONE

FEDERAL	AMOUNT, "✓", or Y/N	CARRYFORWARD
COMPLETE GRAY PARTS OF INTAKE SHEET	/	
Itemized last year and Sales Tax Paid based on INCOME, and received a State refund? / ITEMIZE THIS YEAR?	/	
Prior year State Refund taxable in current tax year? If YES, complete the (3) Sales Tax Calculators.	/	
COMPLETE SALES TAX CALCULATOR IN ITEMIZED DEDUCTION SECTION?	/	
CALCULATE 1099-R CORRECT TAXABLE AMOUNT and ENTER IN BLOCK 2a		
STATE		
MULTIPLE STATES?	/	
FED/STATE/LOCAL RETIREMENT? Up to \$2,500. Subtraction from State return	TP = \$ SP = \$	
AZ CREDITS		
321- (WORKING POOR)	\$	
322 - (PUBLIC SCHOOLS. Extra Curricular Activities, and all day Kindergarten)	\$	
323/348- (SCHOOL TUITION ORGS)	\$	
352 - (FOSTER CARE ORGS)	\$	
LTC PREMIUMS	ENTER \$'s ON STATE <u>ONLY IF NOT ITEMIZING</u>	
PTC		
FLAG AZ PTC?		
MARK PAPER?		
E-FILE		
SELECT FED/ST RETURN TYPES		
INPUT E-MAIL ADDRESS		
MARK READY FOR REVIEW		