

ARIZONA Supplemental Tax Intake & Interview

Check all circles that apply. If the statement does not apply – leave the circle blank.

Part I. Dependents – Did you or your spouse:

- Pay more than 25% AND at least \$800 for the cost to maintain a person 65 of age or older in an ARIZONA residential care institute? (Related or not)
- Pay for more than \$800 for ARIZONA home health care or other medical costs for a person 65 of age or older? (Related or not)
- Have a stillborn child? Certificate Number required for this dependent addition

Part II. Qualifying Ancestors – Did you or your spouse:

- Have an Ancestor (parent, grandparent, or great-grandparent) 65 year of age or older living in your principal residence for the entire tax year? If so,
- Did you pay for more than one-half the support and maintenance costs for this ancestor?
- Did this person require assistance with activities of daily living such as walking, bathing, dressing, eating, getting up and down out of bed/chairs/cars, cooking, brushing teeth, etc.

Part IV. Property Tax Credit – for Incomes below \$3,751 (living alone) or \$5,501 (more than one)

- Were you an AZ resident(s) ALL year and 65 years of age or older OR on SSI Title 16?
- Did you pay property taxes or rent?

Part IV. Tax Credits – Check All that apply

- Did you or your spouse pay income taxes to another state or country during this tax year?

Did you or your spouse make any cash contributions or pay fees (excluding Tuition) to:

NOTE: (Contributions made between January 1st and April 15th may have been used previously)

- 1. AZ Public Schools during this year or have a carryover from a prior year.
- 2. AZ Private school tuition organization during this year or have a carryover from a prior year.
- 3. AZ Charitable organizations during this year or have a carryover from a prior year?
- 4. AZ Foster childcare program organizations.

ARIZONA Supplemental Tax Intake & Interview

Part III. Miscellaneous

- Are you and/or your spouse retired Federal or AZ government (state, city, local) employees?
- Did you or your spouse receive active duty military or reservist pay during this tax year?
- Are you or your spouse a Native American and if so, did you or your spouse live and work on the reservation established for your tribe for the entire year?
- Did you sell any investments for a gain this year which you acquired after 1/1/2012?
- Did you receive any non-Arizona Municipal interest this year?
- This year, did you report a Federal Capital Loss Carry Forward from a non-Arizona source while you were a non-resident of Arizona?
- Did you make contributions to a 529 College Savings Plan this year?
- Did you pay Long Term Care insurance premiums this year and are not itemizing?
- Do you have an ITIN? (ITIN holders are not eligible for any ARIZONA credits)