

## 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.

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**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 15<sup>th</sup> may have been used in the previous tax year)

- 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.

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### 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)