

## ARIZONA Supplemental Tax Intake & Interview

Check all that apply.

### 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 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)

### 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?
- If you do not live alone, do other members of your household have income?
- Did you pay property taxes or rent?

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### 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?

If so, what State or Country? \_\_\_\_\_

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> can be used for either TY2021 or TY2022)

\_\_\_\_\_ 1. AZ Public Schools or Charter School 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.

\_\_\_\_\_ 5. Military Family Relief Organization before 12/31.