

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 of the cost to maintain a person 65 of age or older in an ARIZONA residential care facility? (Need not be a relative)
- _____ Pay for more than \$800 for ARIZONA home health care or other medical costs for a person 65 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, grandparent, grandparent, or great-grandparent) 65 years of age or older living in your principal residence for the entire tax year? If so, --
- _____ Did you pay more than one-half the support and maintenance costs for this ancestor? Dependent or not
- _____ Did this person require help with at least two such activities: walking, bathing, dressing, eating, getting out of bed/chairs/cars, cooking, brushing teeth, etc.?

Part III. Miscellaneous

- _____ Are you and/or your spouse retired Federal or AZ government (state, county, city, local) employees?
- _____ Did you or your spouse receive active-duty military or reservist pay during this tax year?
- _____ **Did you receive an Arizona Families Tax Rebate, or did you have a dependent on your 2023 tax return?**
- _____ Are you or your spouse a Native American and did you or your spouse live and work on a reservation, established for your tribe, for the entire year?
- _____ Did this year, you sell any investments for a gain which you acquired after 1/1/2012?
- _____ Did you receive any non-Arizona Municipal interest this year?
- _____ Did you report a Federal Capital Loss Carry Forward from a non-Arizona source while a non-resident of Arizona?
- _____ Did you make contributions to an AZ 529 College Savings Plan this year?
- _____ Did you pay Long Term Care insurance premiums this year and are not itemizing?

Part IV. Property Tax Credit

_____ Do you have an Individual Taxpayer Identification Number? (ITIN holders are not eligible for any AZ credits)

_____ Were you an AZ resident(s) ALL year and 65 years of age or older, OR on SSI Title 16?

_____ Was your Household Income below **\$3,751** (living alone) or **\$5,501** (more than one). **NOTE:** 1099-SSA, RRB, AZ unemployment and disability benefits are not counted toward these two income limits.

_____ Did you pay property taxes or rent?

_____ If you do not live alone, did anyone who lived with you have income? (How much income?)

Part V. Tax Credits –

Did you or your spouse make any CASH contributions or pay fees (excluding tuition) to an:

_____ AZ Qualified Charitable Organization or have a carryover from a prior year (Forms 301& 321)

_____ AZ Public School or have a carryover from a prior year (Forms 301 & 322).

_____ AZ Private School Tuition Organization or have a carryover from a prior year (Forms 301& 323).

_____ AZ Certified School Tuition Organization or have a carryover from a prior year (Forms 301& 348).

_____ AZ Qualifying Foster Care Organization or have a carryover from a prior year (Forms 301 & 352).

_____ AZ Military Family Relief Fund (Forms 301 & 340).

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

If so, what State or Country? _____ (Forms 301 & 309)

_____ Were you sentenced to at least 60 days in a county, state or federal prison? If yes, not eligible.

NOTE: Some contributions made between Jan. 1 and Apr. 15, 2025, may be used in either TY24 or TY25.