

Client Name: _____

Bank Account and Routing Information

Bank Name: _____ CKG Savings

Worked in another State in 2025

Routing #: _____ Account #: _____

Worked Overtime in 2025

Overtime gross income: _____ (Listed on statement, final paystub, or employer letter)

Lived and worked on a reservation and are a member of that reservations tribe

Income exempt from AZ State Taxes: _____

Aged 73 or older at the end of 2025

Verify if RMDs are applicable and the client has taken them.

1099-R: Is there an amount listed in Box 9B

Mo/Yr pension started: _____ Joint Survivorship? Yes No

1099-R: Received a pension from US, AZ State, or AZ local government, or Uniformed Services

AZ State Exemption: _____

Long-term capital gains on assets acquired after 12/31/2011

Net Income of Gain purchased after 12/31/2011: _____

Itemizing your Expenses (*Request an Itemized Deduction Worksheet*)

QCO/QCFO/School ID #: _____

Made a donation to Qualifying Charitable Organizations (QCO), Public Schools (*including Charter Schools*), Foster Care Organizations, etc.

AZ State Tax Credit: _____

Self-Employment Income (*Request a Self-Employment Worksheet*)

Amount: _____ Amount Used for Medical: _____

Education Expenses (*Request an Education Credit Worksheet*)

Sold a House (*Request a Sale of Home Worksheet*)

HSA Distribution

Purchased and Installed an Energy Efficient Home Item (*Request an Energy Efficient Home Item Purchase Worksheet*)

Did your parent(s) or grandparent(s) who are over 65 lived with you ALL of 2025 (*Request Ancestor Deduction Worksheet*)

Paid Interest on a new vehicle purchased in 2025

Date of Purchase: _____ VIN: _____