

Client Name: _____	Bank Name: _____ <input type="checkbox"/> CKG <input type="checkbox"/> Savings
<input type="checkbox"/> Bank Account and Routing Information	Routing #: _____ Account #: _____
<input type="checkbox"/> Worked in another State in 2025	Other State: _____ Dates lived in other States: _____
<input type="checkbox"/> Worked Overtime in 2025	Overtime gross income: _____ (Listed on statement, final paystub, or employer letter)
<input type="checkbox"/> Lived and worked on a reservation and are a member of that reservations tribe	Income exempt from AZ State Taxes: _____
<input type="checkbox"/> Aged 73 or older at the end of 2025	Verify if RMDs are applicable and the client has taken them.
<input type="checkbox"/> 1099-R: Is there an amount listed in Box 9B	Mo/Yr pension started: _____ Joint Survivorship? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> 1099-R: Received a pension from US, AZ State, or AZ local government, or Uniformed Services	AZ State Exemption: _____
<input type="checkbox"/> Long-term capital gains on assets acquired after 12/31/2011	Net Income of Gain purchased after 12/31/2011: _____
<input type="checkbox"/> Itemizing your Expenses <i>(Request an Itemized Deduction Worksheet)</i>	
<input type="checkbox"/> Made a donation to Qualifying Charitable Organizations (QCO), Public Schools <i>(including Charter Schools)</i> , Foster Care Organizations, etc.	QCO/QCFO/School ID #: _____
<input type="checkbox"/> Self-Employment Income <i>(Request a Self-Employment Worksheet)</i>	AZ State Tax Credit: _____
<input type="checkbox"/> Education Expenses <i>(Request an Education Credit Worksheet)</i>	
<input type="checkbox"/> Sold a House <i>(Request a Sale of Home Worksheet)</i>	
<input type="checkbox"/> HSA Distribution	Amount: _____ Amount Used for Medical: _____
<input type="checkbox"/> Purchased and Installed an Energy Efficient Home Item <i>(Request an Energy Efficient Home Item Purchase Worksheet)</i>	
<input type="checkbox"/> Did your parent(s) or grandparent(s) who are over 65 lived with you ALL of 2025 <i>(Request Ancestor Deduction Worksheet)</i>	
<input type="checkbox"/> Paid Interest on a new vehicle purchased in 2025	Date of Purchase: _____ VIN: _____