



NEWS

April 3, 2008

Contact: Laurie Petrie, Communications Director, 513-345-3393

Message to seniors: You must file tax return to get stimulus check

Many older adults who don't normally file tax returns may not realize they must file a return this year in order to receive an economic stimulus rebate check from the federal government.

Organizations that serve older adults are spreading the word and many are providing tax preparation help online, over the telephone or in person at designated sites. Most of the help is free of charge. Also- people filing a tax return solely to receive a stimulus rebate have until October 15, 2008 to file.

The economic stimulus package allows payments to people who have no tax liability. This includes retirees on Social Security; low-income workers; or those on veterans' disability, pension or survivor's benefits. These people will be eligible to receive a payment of \$300 (\$600 on a joint return) if they file a 2007 tax return showing at least \$3,000 of qualifying income.

Qualifying income includes Social Security, certain Railroad Retirement benefits, certain veterans' benefits and income from wages or self-employment. Income from dividends, interest, capital gains, Individual Retirement Accounts, or Supplemental Security Income (SSI) does not qualify.

The IRS will begin sending payments in May. According to information provided by AARP:

- Taxpayers filing solely to receive the stimulus payment should file a paper form 1040 or 1040A. People who do not normally file a tax return must use a paper form and cannot file electronically.
- Unlike tax refunds, the stimulus rebates will most likely be delivered according to Social Security number, and not on a first-come, first-served basis.

Free help is available from the following organizations:

Council on Aging of Southwestern Ohio – The Community Resources & Information Department is using a service called Benefit Bank to walk people through the steps. We have helped more than 70 people over the telephone and have visited senior housing complexes to help people on site. COA case managers have been spreading the word to clients about the need to file a tax return. We can help homebound people and those who have difficulty navigating the internet or lack internet access. We are also working with **United Way 211** on a plan to help people. Council on Aging serves residents of Butler, Clermont, Clinton, Hamilton and Warren counties. Call 513-345-8643.

IRS – Call 1-800-906-9887, a VITA (Volunteer Income Tax Assistance) number that will help you locate the closest site where IRS or AARP volunteers are available to help you. Call 1-800-829-1040 for general tax questions.

AARP – Call 1-888-AARP-NOW or visit https://locator.aarp.org/vmis/sites/tax_aide_locator.jsp. You can enter your zip code on the website and be given a list of nearby locations for tax assistance.

Senior Centers –For locations, call Council on Aging Community Resources & Information Department, 513-345-8643, or visit the AARP locator web page listed above.

About Council on Aging

Council on Aging of Southwestern Ohio (COA) is a nonprofit organization dedicated to enhancing the quality of life for older adults and their families.

Since 1974, COA has been designated by the state of Ohio as the Area Agency on Aging for Butler, Clermont, Clinton, Hamilton and Warren counties. COA plans, coordinates, funds and administers programs for an area that is home to more than 252,000 adults age 60 and older.

COA promotes choice, independence, dignity and well-being of older adults through a range of services that help them remain in their homes for as long as possible.

One call to COA links people to the wide variety of agencies, information and programs that serve older adults.

For Answers on Aging:

Council on Aging of Southwestern Ohio
175 Tri County Parkway, Cincinnati, OH 45246
513-721-1025 Toll-free 1-800-252-0155
E-mail: info@help4seniors.org.
Website: www.help4seniors.org

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