

IRS News Release

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Free Help Available for Certain Taxpayers, Retirees and Disabled Vets IRS Continues Efforts to Reach People for Stimulus Payments

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WASHINGTON — With the April 15 tax filing deadline quickly approaching, the Internal Revenue Service today reminded taxpayers that free help is available and announced extended hours at some locations.

Free assistance also is available to retirees, disabled veterans and others filing a tax return solely to receive the economic stimulus payment.

“We expect a record number of tax returns because of the stimulus payments. If you can, we urge you to avoid the rush. File now, file electronically and use direct deposit to receive a speedy refund and stimulus payment. If you need assistance, free help is available,” said Doug Shulman, IRS Commissioner.

Timely filing of the 2007 income tax return is particularly important this year because of the economic stimulus payments. Eligible Americans must file a tax return in order to receive economic stimulus payments of up to \$600 (\$1,200 married filing jointly). There is another \$300 payment for each qualifying child younger than 17.

The IRS will use the 2007 income tax return to determine eligibility for the economic stimulus payment and to calculate the amount of the payment. People who normally file a tax return don't need to take any additional steps to get their stimulus payment. Starting May 2, the IRS will transfer economic stimulus payments to taxpayers using direct deposit. It will begin mailing paper checks on May 16.

All IRS Taxpayer Assistance Centers are open Monday through Friday from 8:30 a.m. until 4:30 p.m. Locations are listed at www.irs.gov. Click on “Contact IRS,” then “Contact Your Local IRS Office.” These sites offer free tax preparation and filing for individuals and families whose income is \$40,000 or less.

On Saturday, April 12, nearly 300 Taxpayer Assistance Centers will have special hours from 9 a.m. to 1 p.m. local time to help people filing solely to claim the economic stimulus payment. Assistance will also be provided for taxpayers preparing regular tax returns. Also on April 12, the IRS will offer special Saturday hours on the toll-free help line at 1-800-829-1040 from 10 a.m. to 3 p.m. local time.

As the filing deadline approaches, help is also available from IRS partners that operate 12,000 volunteer tax preparation sites nationwide. To find a nearby Volunteer Income Tax Assistance or Tax Counseling for the Elderly site, people can call 1-800-906-9887. Most VITA sites offer free services to individuals or families whose income is \$40,000 or

less. People who are 60 and older are eligible for free help at TCE sites operated by AARP.

Free File, the private-public partnership that offers free tax software and free electronic filing, is available at www.irs.gov for people whose income is \$54,000 or less. Approximately 70 percent of the nation's taxpayers are eligible for Free File.

Several Free File partners also are offering free forms and filing for those retirees, disabled veterans and others who are filing a tax return solely to receive the economic stimulus payment. This help is available at Free File – Economic Stimulus Payment at www.irs.gov.

Eligible taxpayers will qualify for their stimulus payment simply by filing their 2007 tax return, as they would normally do.

However, people who do not have a tax filing requirement but who have at least \$3,000 in income from any combination of earned income, nontaxable combat pay and certain benefits from Social Security, Veterans Affairs and Railroad Retirement must file a 2007 income tax return in order to receive an economic stimulus payment. They may be eligible for the minimum amount of \$300 (\$600 for married couples) plus the \$300 per qualifying child payment.

The IRS urges people who are filing only to receive the economic stimulus payment to use the Form 1040A. All people in this category are eligible for free assistance.

Key Documents Can Help With Tax Returns

For help in completing a tax return, taxpayers are encouraged to bring certain documents to IRS offices or volunteer sites:

- Photo I.D. (valid driver's license or other photo identification.)
- Social Security Cards for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration
- Birth dates for you, your spouse and dependents on the tax return
- Current year's tax package, if you received one
- Wage and earning statement(s) Form W-2, W-2G, 1099-R, from all employers
- Interest and dividend statements from banks (Forms 1099)
- A copy of last year's Federal and State returns if available
- Bank Routing Numbers and Account Numbers for Direct Deposit
- Total paid for day care provider and the day care provider's tax identification number (the provider's Social Security Number or the provider's business Employer Identification Number)
- To file taxes electronically on a married filing joint tax return, both spouses must be present to sign the required forms.

People filing solely to receive the stimulus payment should bring proof that they have at least \$3,000 in qualifying income. This would include:

- Form SSA-1099 from Social Security or Form RRB-1099 from Railroad Retirement Board, or if 1099 is not available, a monthly statement and/or the amount of monthly benefits.
- Monthly statement from the Department of Veteran's Affairs showing payments you received in 2007 for veterans' disability compensation, disability pension and survivor benefits and/or the amount of monthly benefits.
- Form W-2 showing your non-taxable Qualified Combat Pay.
- Proof of any other income, taxable or nontaxable.

People filing only to receive the economic stimulus payment do not have to file by April 15 and they do not have to file a Form 4868 for an extension. However, they do need to file Form 1040A by October 15 to receive the payment in 2008.

Taxpayers normally required to file who cannot meet the April 15 deadline should file a Form 4868 to obtain an extension to file until October 15. Taxpayers can use Free File to submit the Form 4868 electronically.