



News Release

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October 15 Deadline Nears; Don't Let Stimulus Payment Pass You by

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[Audio Interview](#)

WASHINGTON — The Oct. 15 deadline to file a 2007 income tax return and to receive an economic stimulus payment this year is fast approaching.

This is the deadline for the estimated 4.3 million retirees and disabled veterans who may be eligible to receive a stimulus payment but who normally don't file a tax return. It's also the deadline for the approximately 10 million people who earlier this year received extensions to file their 2007 income tax return.

"Don't let the economic stimulus payment pass you by," said IRS Commissioner Doug Shulman. "If you want the payment this year, you should file by Oct. 15. We recognize that there may be older Americans and disabled veterans who still have not filed for their stimulus payment. If you know of a friend, neighbor or family members who may be in that situation, please give them a hand if they need it."

The IRS has accounted for nearly 80 percent of the Social Security and Veterans Affairs beneficiaries initially identified as potentially eligible.

The IRS has yet to hear from an estimated 4.2 million people who receive certain Social Security benefits and 178,000 who receive certain Veterans Affairs benefits. The agency twice has sent to this group letters that enclosed a Form 1040A, a sample tax form and instructions for sending the tax return to the IRS. If these instructions have been misplaced, the fastest way to obtain a [Package 1040A-3](#) is to go to IRS.gov or to local IRS offices. There are more than [400 local offices nationwide](#) where people can get assistance in preparing the return as well. A return also can be prepared and submitted for free through [Free File](#) which is available at IRS.gov.

People must file a tax return in order to receive an economic stimulus payment even if they normally are not required to file a return.

For eligible individuals, the Economic Stimulus Act of 2008 provided for stimulus payments of up to \$600 (\$1,200 for married couples) or the amount of the taxpayer's 2007 net income tax liability, whichever is less. There also is a \$300 payment for each qualifying child.

There is an income phase-out, starting at adjusted gross income amounts of \$75,000 for single taxpayers and \$150,000 for married taxpayers.

For people who have no tax liability and who have no requirement to file a tax return because their income is too low or nontaxable there is a stimulus payment of up to \$300 (\$600 for married couples) plus the \$300 payment for each qualifying child. However, people in this situation must have at least \$3,000 in qualifying income from earned income, nontaxable combat pay as well as certain benefits from Social Security, Veterans Affairs and Railroad Retirement.

Qualifying income from Social Security includes retirement, disability and survivor benefits. Supplemental Security Income is not a qualifying income. Qualifying income from Veterans Affairs includes disability compensation, disability pension and survivor benefits. Qualifying Railroad Retirement Board benefits include the social security equivalent portion of Tier I benefits. Also, those who are dependents or eligible to be dependents on another's tax return are not eligible. People must have a valid Social Security Number unless their spouse is a member of the military.

The IRS has partnered with numerous organizations, including AARP, Center on Budget and Policy Priorities, National Council on Aging, Community Action Partnership, United Way, National League of Cities, National Disability Institute and National Community Tax Coalition. These organizations also are conducting outreach efforts to older Americans and veterans.

Also, each year, there are approximately 10 million taxpayers who request an extension from the April 15 deadline to file their tax return. The extension applies only to filing a return, not to paying any taxes owed. Oct. 15 is a final deadline for these extension taxpayers to avoid any penalties. They, too, may be eligible for the economic stimulus payment but must file a 2007 return by Oct. 15 to receive the payment this year.

By law, the IRS cannot disperse any economic stimulus payments after Dec. 31. However, people who may be eligible for an economic stimulus payment can claim a credit in 2009 by filing a 2008 income tax return.

As of Aug. 29, the IRS has issued \$93 billion in economic stimulus payments to 114.8 million individuals and families.

Those who already have filed a 2007 tax return but who have not yet received an economic stimulus payment, can check on the status of your payment by going to ["Where's My Economic Stimulus Payment?"](#) on the IRS.gov Web site.

People also can call 1-866-234-2942 and, after selecting English or Spanish language, should press 2 to check on the status of the stimulus payment. People will need their Social Security Number (the one listed first on the 2007 return), filing status (single, married, etc) and the number of exemptions claimed on the return.