

For Immediate Release: Aug 7, 2008

Rochester, NY...Thousands of lower income older adults and those younger than 65 who are on Social Security Disability still have not filed the 2007 tax form needed to receive the minimum tax stimulus rebate of \$300.

According to just released IRS records, 14,198 low-income Monroe County residents, 1964 low income Ontario County residents and 2890 low income Wayne County residents are eligible for the rebate, but have not filed. 6,469 non-filers reside live in the City of Rochester. This represents more than \$5.7 million dollars in unclaimed tax rebates in the three counties.

Many who are eligible for the economic stimulus payment are not normally required to file a tax return because they have too little income or receive nontaxable benefits. They may not have filed a tax return in many years — since they retired or became disabled. They may not understand that they must file now to get this special, one-time payment, or they may be intimidated by the tax filing process. Others may mistakenly fear that receiving the stimulus payment might endanger their eligibility for retirement or disability benefits or for other vital public benefits such as Medicaid, Supplemental Security Income - SSI or Food Stamps, upon which they rely.

According to Ron Brandwein, a financial benefits specialist at Lifespan, the requirement to file a 2007 tax return to receive the rebate has been causing confusion among some older adults. "They don't understand what is required of them," Brandwein said. "Others may be living in nursing homes, but they too are eligible for the rebate if they have at least \$3000 in qualifying income."

Qualifying income includes wages, some Social Security benefits, certain veterans' benefit payments and railroad retirement benefits. The income must be reported on a new version of form 1040A. People who don't pay taxes and who have less than \$3000 of qualifying income are not eligible for the rebate.

Residents should file by Oct. 15, 2008 to receive the rebated by December 31, 2008.

According to the IRS, nationally 5.2 million seniors and disabled veterans have not yet claimed their economic stimulus payments.

Because 9000 of Monroe County's 14,198 non-filers are age 65 or older, Lifespan will hold a tax assistance day on September 25 from noon to 3 pm. Call 244-8400, ext. 161 to make an appointment.

Any filer also can receive assistance with the forms by walking into the IRS Office at 255 East Avenue or call 1-800-829-1040.