

February 25, 2009

To: CyberTax members

From: Bonnie Speedy, National Director, AARP Tax-Aide

Subject: CyberTax 2009-017: Economic Stimulus Direct payment

If you're like me, you were probably watching the news about the new economic stimulus bill closely to see what impact it might have on our AARP Tax-Aide sites. As you may be aware, it will be a direct payment in May or June. I am sure I am not the only one who is relieved by that news.

We know that many of you work with your local press to get publicity for the program and are otherwise have high visibility as a tax expert in your community. Should you be asked or be inclined to share with seniors, aging centers, senior centers, media outlets:

1. Alert them that filing a tax return is not necessary this year to receive payment (see list below).
2. Remind them to be aware of potential scams related to this payment. You should know and can tell others that, the IRS does not send out unsolicited e-mails or ask for detailed personal information. Additionally, the IRS never asks people for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

A few more details on the Economic Recovery Payment or "senior payment":

A one-time payment of \$250 will be made in 2009 to:

- Retirees, disabled individuals and Supplemental Security Income (SSI) recipients receiving benefits from the Social Security Administration.
- Disabled veterans receiving benefits from the U.S. Department of Veterans Affairs.
- Railroad Retirement beneficiaries.

The IRS will not make this payment — unlike last year's economic stimulus program. Individuals who may qualify for this year's economic recovery payment should contact their respective agency (Social Security Administration/ Veterans Affairs/ etc.) for more information. The Social Security Administration web page will have a special section on the economic recovery payment.

One of the two Bulletin articles (links below) states that Federal and state retirees who don't receive Social Security benefits also will qualify to receive the payment but may have to file 2009 tax returns to receive it. Some information is available at:

<http://www.ssa.gov/payment/>

For more information you can also visit: [Tax Provisions in the American Recovery and Reinvestment Act of 2009](http://www.irs.gov/newsroom/article/0,,id=204335,00.html)

(<http://www.irs.gov/newsroom/article/0,,id=204335,00.html>).

AARP has also published articles in the AARP Bulletin online that further details the senior payment in the new economic stimulus bill for which you may have interest. AARP may be including some of this information in print or with the press – decisions are pending.

The online Bulletin story links are:

The Stimulus Package and Older Americans

One-time \$250 "senior payment" helps people on a limited income—and they'll spend it
http://bulletin.aarp.org/yourmoney/personalfinance/articles/the_stimulus_package_and_older_americans.html

Senior Payments to Start in May:

http://bulletin.aarp.org/yourmoney/personalfinance/articles/senior_stimulus_payments.html%22

The articles may provide some additional context and reinforce the message that for this payment filing a tax return is not necessary.

Thanks for all you do.

Leaders, please share this information with volunteers who may not receive CyberTax.

**CyberTax messages will be available weekly on the Extranet (<http://www.aarp.org/tavolunteers>) in the "General Program Communication" section.

*** "No attachment intended"

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