



Senior Legal Hotline

444 North 3rd Street #312 ❖ Sacramento, CA 95811

Telephone: (916) 551-2140 ❖ Toll-free: (800) 222-1753

Fax: (916) 551-2197 ❖ www.seniorlegalhotline.org

SENIOR LEGAL FACT SHEET

To get your 2008 ‘rebate,’ you must file a tax return

- ▶ Low-income people who aren’t required to file and owe no income tax may still qualify for \$300 or more from the government.

Who is eligible?

- ▶ Under the federal government’s recently announced “stimulus” package, more than 130 million households can get a one-time check this year from the IRS.
- ▶ To qualify, an individual, couple or family needs to have received as little as \$3,000 or more income in all of 2007 from wages or pensions. Social Security payments alone qualify, as do Railroad Retirement or veteran benefits.
- ▶ If you file a regular tax return, you need do nothing more. Your check will be mailed to you.
- ▶ If you don’t normally file a tax return, you must do so in order to receive the payment. This can be done through the summer (April 15 is not the deadline), and help is available (see below).

What if I receive SSI?

- ▶ SSI benefits do not count toward the \$3,000, but if you receive enough other income too, having some SSI is OK.
- ▶ If you do receive SSI or any other needs-based benefits like TANF or food stamps, the one-time payment you get will not affect them.

How much will I get?

- ▶ Single taxpayers who qualify will receive \$300, couples \$600. If you have dependent children, you can receive more. (People with very high incomes will receive less, or none.)

How can I be getting a “rebate” if I pay no taxes?

- ▶ The payment is not truly a “rebate” – because you can receive it even if you owe no income tax. It will not affect what you owe, and it will come in addition to any refund you may be due from tax withheld.

What do I need to do?

- ▶ Many low-income people who get Social Security don’t normally need to file a tax return. But this year, it’s worth it. You need to use form 1040 or 1040A. You can pick one up at a post office. For on-line information, go to www.irs.gov. There is an easy, on-line tool at www.aarp.org/stimulus.

What if I need help filing my taxes?

- ▶ Free help with tax returns is available in most neighborhoods from the VITA program. Call 800 906-9887 or visit <http://www.ftb.ca.gov/individuals/vita/sites.asp> to find a site near you. Another source of help is AARP’s Tax-Aide program, 888 227-7669 or https://locator.aarp.org/vmis/sites/tax_aide_locator_adv.jsp.

If you are over 60 in California, you can get free advice by phone from the Senior Legal Hotline regarding your questions about this or any other legal issue. Call (916) 551-2140 in Sacramento or (800) 222-1753 toll-free in California, Mon.-Fri. 9 to 12 and 1 to 4, and until 7 p.m. on Thursdays. Or submit your question by e-mail from our web site, www.seniorlegalhotline.org. The Senior Legal Hotline is a project of Legal Services of Northern California, a nonprofit public service agency, supported by the the state Department of Aging, U.S. Administration on Aging, Area 4 Agency on Aging, grants and voluntary donations.