

The Easy Guide to Getting Your Economic Stimulus Payment

Use the step-by-step guidance below to learn how to receive an economic stimulus payment. This information is for individuals who know they do NOT otherwise have to file a 2007 federal income tax return. If you do have to file a 2007 federal income tax return, there is no additional action needed to receive your stimulus payment. Just file your return as usual.

To be eligible for the Economic Stimulus Payment (also called the “Stimulus Rebate”), the following must be TRUE:

- All filers must have a valid Social Security number. A valid Social Security number does not start with a nine. If you are married, and only one of you has a valid Social Security number, that person must file alone as “single.”
- No person (other than you, or the two of you if married) can claim you as a “dependent” which means they pay more than half the cost of your, or your spouse’s, total living expenses such as your rent, food, clothes, etc.
- You had at least \$3,000 of work income and/or Social Security income in 2007 (certain Railroad Retirement benefits and veterans’ disability compensation, pension or survivors’ benefits received from the Department of Veterans’ Affairs also count).

If you are eligible, you’ll need to fill out a 1040A form. The IRS should have mailed you this form along with other information about the stimulus (visit www.aarp.org/taxaide to see what the IRS packet looks like), but if you cannot locate your form, pick one up in a post office, library, or print one from www.irs.gov. You can also call the IRS at

1-800-829-3676 to order a form. Please listen to the recorded message. It takes a while, but there is a prompt for ordering the form.

STEP 1: Write “Stimulus Payment” across the top of the 1040A form and then where it says “Label Here,” fill in your name, address and Social Security number for you and, if applicable, your spouse.

STEP 2. (“Filing Status” section of the 1040A): Are you single? Check box 1. Are you married? Then check box 2.

STEP 3: (“Exemptions” section of the 1040A):

1. At line 6a and b—Check the box for you on 6a, and your spouse, if applicable, box 6b.
2. Write “1” if you are single or “2” if you are married in the top box in the Exemption section on the right-hand side of the form.
3. In the box labeled “d”—Again write, “1” if you are single and “2” if you are married.

(Note: If you have a child or pay for more than half of someone’s living expenses (which includes rent, food, clothing, etc.), these instructions are not sufficient. Please see “Where to Go for Help” for assistance.)

STEP 4: (“Income” section of the 1040A form):

1. In line 7, fill in your 2007 income from a job, if any (if you were employed, you should have been sent a W-2 form—your

employment income will show up in box 1 of that form). If you had self-employment income, it will be shown in box 7 of your 1099 MISC form. (Note—if you are between the ages of 25 and 65 and have work income, you MAY be eligible for an additional payment called Earned Income Tax Credit (EITC). See “Where to Go for Help” below to get assistance in filing for both Stimulus and EITC payments.)

2. In line 14a, enter the amount of money you received from Social Security in 2007 (this can be found in box 5 of your 1099 SSA Statement). If you cannot find your 1099 SSA form, please estimate the amount by multiplying your 2007 monthly Social Security payment by 12 or the actual number of months you received the benefit if not a full year. If you received veterans or certain Railroad

benefits (found on in box 5 of your 1099 SSA Statement or RRB 1099), add that to your Social Security income (if any) and put the total on line 14a. Leave 14b (the taxable amount) blank. (Note, if the numbers on lines 7 and 14a add up to less than \$3,000, please call the Social Security Administration or VA to get the actual yearly 2007 amount BEFORE any deductions.)

3. There is no need to fill in other income amounts for this Stimulus application. Note: If you are at all unsure whether you need to file an actual (“regular”) 2007 Federal Income Tax return, see “Where To Go For Help.”

STEP 5: Page 2 “Sign Here” section: Make sure you sign the form. If married, both must sign.

STEP 6: Use the following chart to determine where to mail your completed form:

IF you live in...	THEN use this address:
Alabama, Delaware, Florida, Georgia, North Carolina, Rhode Island, South Carolina, Virginia	Department of the Treasury Internal Revenue Service Center Atlanta, GA 39901-0099
District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New York, Vermont	Department of the Treasury Internal Revenue Service Center Andover, MA 05501-0099
Arkansas, Connecticut, Illinois, Indiana, Michigan, Missouri, New Jersey, Ohio, Pennsylvania, West Virginia	Department of the Treasury Internal Revenue Service Center Kansas City, MO 64999-0099
Kentucky, Louisiana, Mississippi, Tennessee, Texas, APO, FPO	Department of the Treasury Internal Revenue Service Center Austin, TX 73301-0099
Alaska, Arizona, California, Colorado, Hawaii, Idaho, Iowa, Kansas, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	Department of the Treasury Internal Revenue Service Center Fresno, CA 93888-0099

The IRS will figure the amount of the payment for you and mail you a check.

Where to Go For Help:

If you need additional assistance, go to an AARP Tax-Aide* site. Most are open until April 15, 2008. Find a site near you at www.aarp.org/taxaide or call **1-888-227-7669**. At www.aarp.org/taxaide, you can also find helpful information and even ask specific tax and stimulus payment related questions

to an IRS-certified AARP Tax-Aide volunteer. This service is available 12 months a year, 24 hours a day. Answers will be emailed back to you within a few days. You can also go to www.irs.gov or call **1-800-829-1040** for IRS assistance or to find an IRS Taxpayer Assistance Center (TAC) near you. TACs are open past April 15.

**AARP Tax-Aide is an AARP Foundation program offered in conjunction with the IRS.*