

Press Release

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62,723 Bay Area Seniors, Veterans and Disabled Still Need to Claim \$18 Million in Economic Stimulus Payments

Low-income residents can get free assistance until Oct. 15 to file for payments

SAN FRANCISCO, Oct. 2, 2008 -- United Way of the Bay Area today announced that free help is still available for more than 60,000 Bay Area residents — mostly low-income seniors, disabled veterans and others with disabilities — who have not yet filed to receive their stimulus payments. According to data released by the Internal Revenue Service last month, more than \$18 million in stimulus payments remain unclaimed by 62,723 Bay Area residents – specifically, those residents who do not normally file federal income tax returns because their income is low. These residents must file returns this year to receive the federal stimulus payment.

Free assistance with claiming the stimulus payment is still available at several tax sites operated by Earn It! Keep It! Save It!, the Bay Area’s largest free tax assistance program, which is coordinated by United Way. Eligible people have until October 15 to file for their payments. United Way encourages low-income residents who want to claim the economic stimulus payment to call 2-1-1 or 800-358-8832 to receive a referral to a free tax site.

“Throughout the Bay Area, thousands of people who can use these stimulus payments the most are missing out,” said Carole Watson, chief community investment officer for United Way of the Bay Area. “We want to let them know they are eligible, and they don’t need to spend money to get help filing their returns; Earn It! Keep It! Save It! sites can help them file their forms free of charge.”

This year, the IRS announced that 20 million low-income seniors, disabled veterans and others with disabilities -- who are not otherwise required to file a tax return -- were at risk of missing out on their stimulus payments. On September 7, the IRS announced that 4.3 million people in that group

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nationwide had not yet filed. The agency distributed a list of the “Top 100 Counties Nationwide with Unclaimed Economic Stimulus Payments”

(<http://www.cbpp.org/stimuluspayment2008/top100counties.pdf>), which cites four Bay Area Counties:

- Alameda County: 19,571 remaining to file; \$5,871,300 in unclaimed payments
- Santa Clara County: 17,229 remaining to file; \$5,168,700 in unclaimed payments
- San Francisco County: 13,473 remaining to file; \$4,041,900 in unclaimed payments
- Contra Costa County: 12,450 remaining to file; \$3,735,000 in unclaimed payments

The list pinpoints counties where individuals not normally required to file federal income tax returns because their income is low or tax-free must file one this year to receive a stimulus payment. They could be eligible for stimulus payments of \$300 to \$1,200, based on income, family size and circumstance. These include:

- Senior citizens
- People with disabilities
- Veterans
- Social Security recipients
- Retired railroad workers
- Low-income workers who earned at least \$3,000 in 2007

Individuals who make at least \$3,000 in qualifying income can receive a stimulus payment. Qualifying income includes earned income, such as wages and net self-employment income, as well as Social Security or certain railroad retirement benefits. Veterans' disability compensation, pension and survivors' benefits received from the Department of Veterans Affairs in 2007 also qualify.

About Earn It! Keep It! Save It! Bay Area

Led by United Way of the Bay Area, Earn It! Keep It! Save It! Bay Area coordinates 161 free tax preparation sites and asset development programs in Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo and Solano Counties, with the participation of over 200 public and private-sector partners. Funding partners include Annie E. Casey Foundation, Bank of America, Chevron, City of Oakland, East Bay Community Foundation, Evelyn and Walter Haas, Jr. Fund, Firedoll Foundation, First 5 Alameda County, First Five Contra Costa, HSBC Bank USA, N. A., KPMG LLP, Levi Strauss Foundation, National Disability Institute, Port of Oakland, The San Francisco Foundation, State Street of California, Walter & Elise Haas Fund, Union Bank of California, United Way of the Bay Area, Wells Fargo & Company, Y&H Soda Foundation and others. For more information please visit www.EarnItKeepItSaveIt.org or call 415-808-4300.

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