

Morris seniors urged to seek rebates

Menendez, IRS officials explain stimulus program requires filing of tax return

BY MICHAEL DAIGLE
DAILY RECORD

HANOVER — Urruttia O'Rourke is the kind of person U.S. Sen. Robert Menendez had in mind when he and others worked to extend the federal stimulus tax rebate to senior citizens and veterans.

O'Rourke, 78, of Landing lives alone and gets help from the Morris County Organization for Hispanic Affairs to pay for heating oil. She also does not file a tax return. On Wednesday, after hearing Menendez explain the tax rebate program, O'Rourke said she would use her refund to pay to heat her home.

Menendez, one of two Democrats from New Jersey in the U.S. Senate, explained the rebate program to about 30 seniors and others at a meeting at the Morris County Library. Officials from the IRS were also on hand as were AARP New Jersey President Sy Larsen and Harry Ettinger, spokesman for the state's disabled veterans.

The key to getting a rebate is to file a federal tax return, Menendez said.

"Many seniors and disabled veterans do not usually have to file tax returns, but must do so this year in order to receive a rebate check," Menendez said.

The senator said that he led efforts to expand the original legislation authorizing the tax rebate plan to include seniors and veterans, who would have

been excluded from the rebate program if action had not been taken.

The idea behind the rebate program is to get extra money in the hands of American who need it, he said, and with the rising cost of gasoline, many seniors and veterans are having trouble paying to heat their homes, buying food and making ends meet.

Thanks to the changes in the bill, 3.8 million New Jersey residents are eligible to receive \$3.2 billion through the rebate program, Menendez said.

"Residents will use this money to buy food, clothing and other essentials, which will have a ripple effect through the economy," Menendez said.

The senator said the money is coming at the right time. He said he is concerned that the U.S. economy is in for a sustained rough patch until the banking and subprime mortgage problems are sorted out.

Taxpayers who earned at least \$3,000, and have not normally filed a federal tax return, should plan to file a Form 1040 or Form 1040A to qualify for the rebate, said Gregg Semanick, an IRS spokesman.

To get a rebate

■ You are eligible for the 2007 federal stimulus tax rebate if you have a total of \$3,000 or more in qualifying income from the following sources: Earned income; Social Security; certain railroad retirement benefits; certain veterans benefits; and non-taxable combat pay.

For information, call the IRS Hotline at (866) 234-2942 or visit www.irs.gov. Report any attempted scam related to the rebate program to phishing@irs.gov.

■ For information on Earned Income Tax credits, call First Call for Help, 2-1-1.

Semanick said the IRS mailed over 500,000 information packets including the necessary tax forms to seniors, veterans and other qualified filers.

The income from the rebate is not taxable as far as the federal government is concerned, and will not affect benefits received under other programs that have income requirements, Menendez said.

"That would be giving and taking away," he said.

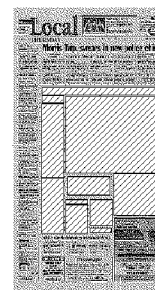
Menendez said that he expects New Jersey officials will make the same ruling.

Semanick also cautioned taxpayers to be on the alert for rebate scams that ask for personal information in order to process the rebate.

The IRS does not make telephone calls or send emails and ask for personal financial information, he said.

John Franklin, chief executive officer for the United Way of Morris County, said that many low-income residents should file a tax return because they could be eligible for an Earned Income Tax Credit.

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JOHN BELL / DAILY RECORD

U.S. Sen. Robert Menendez, D-N.J., listens to Harriet Buono of Dover during a information session about the tax rebates that are part of the federal economic stimulus package this year. About 30 people, below, attended the meeting at the Morris County Library in Whippany Wednesday.

