

From: Rettig Charles
Sent: Friday, April 3, 2020 10:16 PM
To: Robert Kerr <rkerr@naea.org>
Cc: Lemons Terry; Rettig Charles; Ganter Derek; Hardy Mel
Subject: Seeking Economic Impact Payment outreach assistance

Bob,

At the IRS, we are soon going to be coordinating the delivery of Economic Impact Payments in the amount of \$1,200 to *every* eligible American. As you know, things are moving fast in a most difficult environment and we want to get this right, from every perspective.

I've long viewed "tax administration" as the responsibility of everyone on behalf of everyone else. In this regard, we believe the assistance of the NAEA community is critical to the overall success of getting these \$1,200 payments out to all eligible individuals.

The IRS has strong support from the national, state and local tax communities, general and tax-related media, state and local tax authorities, etc. However, we need to reach *beyond our normal contacts* to reach many *lower income, non-filers, military, veterans, ethnic and homeless communities* who are not in the system and might otherwise not step up to provide information that would enable the IRS to generate the payments on their behalf. *We need to mobilize these communities in a significant manner*, with the full support of the IRS throughout.

I have attached some information that can be shared now. Social Security beneficiaries who are not typically required to file tax returns will not need to file an abbreviated tax return to receive an Economic Impact Payment. Instead, payments will be automatically deposited into their bank accounts. People with an adjusted gross income of up to \$75,000 for individuals and up to \$150,000 for married couples filing joint returns will receive the full \$1,200 payment and up to \$500 for each qualifying child. The IRS will use the information on the Form SSA-1099 or Form RRB-1099 to generate Economic Impact Payments to recipients of benefits reflected in the Form SSA-1099 or Form RRB-1099 who are not required to file a tax return and did not file a return for 2018 or 2019. This includes senior citizens, Social Security recipients and railroad retirees who are not otherwise required to file a tax return

By early next week we will have specific information available about how people can go online to provide information (others could file an informational "zero" return) and, if they also provide banking information, they could receive their Economic Impact Payment quickly by direct deposit. Others, would receive a paper check.

We'd appreciate you and the NAEA members thinking creatively and circulating the attached information and additional information we will soon be providing far and wide, and especially providing assistance in getting this information *beyond our normal tax-related outlets*.

We need to spread this information quickly, into *every* local community - *feel free to forward this email to your friends and colleagues*.

I've copied Terry Lemons, our IRS Communications Director, Mel Hardy and Derek Ganter should there be a desire to follow-up.

Thanks, stay safe and healthy!

Best,
Chuck

Charles Rettig
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