DDD Office of Quality Programs and Services - Caregiver Alert # 14 (Updated: 2-12-09)

WHAT DO I KNOW ABOUT EARNED INCOME TAX CREDIT?

The Earned Income Credit (EIC) is a tax refund for those who work, but don't earn very much money. For people who meet the requirements, the government gives additional refunds at tax time. The money may be used to put food on the table, move into better housing, or pay for other needs.

YOU may qualify if you earn less than: ✓ \$12,880 -\$15,880 if married filing jointly), if there is NO qualifying child OR ✓ \$33,995 - \$36,945 - if there is ONE qualifying child OR \checkmark \$38,646 - \$41,646 - if married and filing jointly. if there is MORE THAN ONE qualifying child

HOW DO I KNOW IF THE PERSON I SUPPORT (OR I) WILL QUALIFY?

DON'T GUESS! KNOW!

IF YOU DON'T HAVE A CHILD:

✓ You MUST have earned income

- ✓ You MUST have a valid Social Security number
- \checkmark You MUST be at least 25 but under 65 years of age
- \checkmark You MUST live in the US for more than half a year (check for exceptions for military service)
- \checkmark You CANNOT be claimed as a dependent on someone else's taxes



- ✓ You <u>CANNOT</u> live with a relative who can claim you as a qualifying child/dependent even if they don't file for the EITC
- ✓ You <u>CANNOT</u> file for taxes under "married filing separately"
- ✓ You CANNOT have investment income of over\$2,900.00



In addition, if you think you are or you have a qualifying child, check the rules carefully!

• The qualifying child <u>MUST be</u> related to the person he/she

lives with;

- The qualifying child <u>MUST be under 19</u> years of age OR permanently disabled at any age;
- The qualifying child <u>MUST live with the</u> <u>relative</u> for more than half a year; and
- The qualifying child <u>MUST NOT</u> be eligible to be claimed by anyone else, even if that other person does not claim the qualifying child.

HOW DO YOU FIND OUT FOR SURE IF YOU QUALIFY?

Call for free assistance from resources such as:

- Telephone Assistance for Individuals: Toll-Free, 1-800-829-1040 (Hours of Operation: Monday - Friday, 7:00 a.m. - 10:00 p.m. your local time)
- ✓ The Volunteer Income Tax Assistance (VITA) program; for the closest site call 1-800-829-1040.

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- ✓ AARP's Tax-Aide counseling program 1-888-227-7669
- ✓ Telephone assistance from the IRS at 1-800-TAX-FORM
 ✓ www.irs.gov or call 1-800-TAX-1040



IF YOU THINK THE PERSON YOU SUPPORT (OR YOU) MIGHT BE ELIGIBLE - GET MORE INFORMATION!