



## CASH NEWS

### 3 SITES OPEN APRIL 15

CASH Oregon, AARP Tax-Aide and their volunteers have arranged for three sites to be open on Tuesday April 15, the last day this year to file an on-time return. The sites are the Hillsboro Library (10-4), Lloyd Center (10-6) and Rockwood Weed and Seed (10-4). All sites will be walk-in; no appointment is necessary. Please remind all procrastinators to come on in!

### LLOYD CENTER TO EXTEND TAX SEASON TO MAY 31

**PLUS!** The Lloyd Center site will open Thursday, Friday and Saturday, April 17-19, and 24-26, plus each Saturday in May (except May 24). Specific attention will be focused on completing past year returns, economic stimulus returns, and Individual Tax Identification Number (ITIN) applications and returns. The hours will be 10 - 4; Spanish translation will be available. Thanks to Bob Newberry, Bill Ensign and Jim Harper for making this happen!

### THE MOBILE TAX UNIT IS ON THE ROAD

CASH Oregon and AARP Tax-Aide have formed a 5 person free tax preparation team which goes to an employer's location to prepare returns for their employees, funded by a grant from Multnomah County's Family Economic Security Project. The Project's goal is to improve the economic bottom line for low-income working families by partnering with local employers to provide tax assistance to their employees by helping them claim the Advanced Earned Income Tax Credit. On-site free tax preparation by the mobile unit helps reinforce the benefit to both employees and employer.

Janet Hawkins, Project Coordinator for Multnomah County, says: "We are delighted with the results to date. The commitment and professionalism of the tax preparation volunteers is outstanding."

Jim Harper and Sarah Broderick are leading this pioneering effort for CASH. Jim says: "It's going really well. We look forward to forming more mobile units next year."

### STRONG RESULTS CONTINUE

After over eight weeks this year, the CASH Oregon and AARP Tax-Aide sites in the three Portland metropolitan counties have prepared 11,237 returns, compared to 11,721 for the entire previous tax season. Earned Income credits to date have totaled \$3.3 million, equal to all last year; federal tax refunds are \$10.2 million, vs. \$10.7 million for last year. The highest volume sites continue to be Lloyd Center, the Milwaukie Center, the two library sites in Hillsboro, and the Beaverton library. Bill Ensign and Tom Fisher, District Coordinators, report that most all sites are operating at capacity. Jim Harper, Executive Director, again wished to thank all the volunteer tax preparers, greeters, and translators for the commitment and patience.

#### FORUM RETREAT: MAY 16

The CASH Oregon Forum will meet on May 16 from 9 to 3 at a to be announced site to review 2008 and plan for 2009.

**SAVE THE DATE! SAVE THE DATE!**

#### WHERE TO GET HELP

For free tax preparation sites call:  
2-1-1 Information & Referral, or  
CASH Oregon at 503-243-7765, or  
AARP Tax-Aide at 888-227-7669

#### Site information available on the web

[www.cashoregon.org](http://www.cashoregon.org)  
[www.aarp.org/money/taxaide](http://www.aarp.org/money/taxaide)



2010 Lloyd Center Mall  
 Portland OR 97232  
 www.cashoregon.org

Jim Harper, Executive Director  
 Sarah Broderick, Volunteer Coordinator  
 Thomas Kost, Americorps\*VISTA

Bill Ensign, District Coordinator  
 Tom Fisher, District Coordinator  
 Gwen Williams, State Director



## SURVEY DATA FROM LLOYD CENTER

For the second year CASH Oregon is asking taxpayers to complete a short survey form at the Lloyd Center site. The selected data below is from over 1,000 completed surveys last year, and over 960 to-date this year. Other questions include home zip code, how did they learn about free tax preparation, and their interest in other financial education topics. This information will assist future outreach and site location efforts.

### YEAR TO YEAR COMPARISON

	2008	2007		2008	2007
<b>Asian/pacific</b>	7%	7%	<b>&lt; 40</b>	55%	51%
<b>African American</b>	20%	19%	<b>40-59</b>	31%	29%
<b>Hispanic</b>	30%	22%	<b>&gt;59</b>	11%	9%
<b>Native Am</b>	2%	3%			
<b>Caucasian</b>	31%	34%	<b>Have children</b>	36%	31%
<b>Other/&gt;1</b>	5%	2%	<b>at home</b>		
<b>Used a free site last year</b>	53%	41%	<b>Avg adjusted gross income</b>	\$20,396	\$19,632

### ITIN APPLICATIONS AND RETURNS PROCESSED AT THREE SITES

ITIN applications and tax returns are being prepared this year for the first time at three CASH Oregon/Tax-Aide free tax preparation locations. The three sites are: Centro Cultural in Cornelius; Lloyd Center (suite 2010 in the Lloyd Center Mall); and the Rockwood Weed and Seed site at 18709 SE Stark in Portland. [Note: Catholic Charities, a CASH Oregon Forum member, also is helping prepare ITIN applications]. This service avoids a trip to the IRS or paying a fee to a commercial service.

An ITIN ( Individual Taxpayer Identification Number) is a tax processing number only available for certain nonresident and resident aliens, their spouses, and dependents who cannot get a Social Security Number (SSN). It is a 9-digit number, beginning with the

number "9", formatted like a SSN (NNN-NN-NNNN). ITINs are for federal tax reporting only, and are not intended to serve any other purpose. It does not authorize work in the U.S. or provide eligibility for Social Security benefits or the Earned Income Tax Credit.

CASH/Tax-Aide volunteers assist tax payers to complete the ITIN applications, including copying and notarizing the required personal identification (note: ITIN applications must be included for all claimed exemptions and dependents). Taxpayers then mail the applications and a paper copy of their completed tax return to the IRS.

This service helps taxpayers avoid fees which commercial services sometimes charge.

### NEW SOCIAL SECURITY NUMBER ?? THE IRS MAY OWE YOU MONEY

If you have received a Social Security number since you last filed a tax return, and if you used an ITIN for your previous tax returns, you may qualify for an additional federal tax refund from the government. The reason is that, using your new social security number, you may file amended tax returns for up to 3 years. By doing so, you may then qualify for the Earned Income Tax Credit in those prior years, which is avail-

able only to taxpayers with a Social Security number.

Recently at the CASH Oregon/Tax-Aide Lloyd Center site, a Hispanic mother of two arrived with a recently issued Social Security number. After qualifying for a \$2,700 refund for 2007, she then received a \$2,500 refund for each of the last two years after filing amended returns with her new social security number. This discovery brought large smiles to her and the volunteer tax preparer.

### REMINDER!! STIMULUS CHECKS REQUIRE A 2007 TAX RETURN!! REMINDER!!

Many Social Security and low-income workers who don't normally need to file a tax return will need to file one for 2007 to receive a Economic Stimulus Payment. The IRS set aside March 29 as a Super

Saturday to publicize this filing requirement, and five IRS employees worked at the Lloyd Center site to prepare ESP returns. All CASH Oregon / Tax-Aide sites can prepare Stimulus returns during their regular hours.