

# news release

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FOR IMMEDIATE RELEASE

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## INDIANA STATE INCOME TAX REFUND FOR CERTAIN 65 YEARS OR OLDER RESIDENTS

Older Indiana Hoosiers who have only small incomes or no income other than Social Security benefits are eligible to apply for the 'Indiana Unified Tax Credit for the Elderly' using Form SC-40 for tax year 2009.

The Area 9 In-Home and Community Services Agency, which provides services to older adults and physically disabled individuals in Fayette, Franklin, Rush, Union and Wayne Counties, wants to remind the elderly and their caregivers that eligible older adults may receive a check from the State of Indiana in the amount up to \$100 for a single or widowed 65+ or \$140 for a married couple who are both 65+. The deadline for filing the Form SC-40 is June 30, 2010.

According to Tony Shepherd, Executive Director of Area 9, "The SC-40 is relatively simple and easy to complete, for a tax form. The form itself is less than a single page and the instructions are only a single page in length."

You may be able to claim a credit if you and/or your spouse meet the following requirements:

- ü You and/or your spouse must have been age 65 or older by December 31, 2009;
- ü If married, you must file a joint return;
- ü You and/or your spouse must have been an Indiana resident for more than six months during 2009; and
- ü You and/or your spouse must not have been in prison more than 180 days during 2009.

You may file a claim if you meet **all** the above requirements, **and**

- ü You are single or widowed and your income on Line E is under \$2,500; **or**
- ü You are married, and only one person is age 65 or older, and your income on Line E is less than \$3,500; **or**
- ü You are married, both of you are age 65 or older, and your income on Line E is less than \$5,000.

The SC-40 'Unified Tax Credit for the Elderly' form is available at most public libraries in Area 9, at our Richmond and Connersville offices, most senior citizen centers or online at [www.in.gov/dor/4167.htm](http://www.in.gov/dor/4167.htm) and scroll down to 'SC-40'.

If an older person, family member or caregiver has any questions, please contact us by calling 765-966-1795 or 1-800-458-9345. Area 9 Agency is a service of Indiana University East.