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Date: May 3, 2011

To: Rep. Phil Barnhart, Co-Chair  
Rep. Vicki Berger, Co-Chair  
House Committee on Revenue

From: Rick Bennett *PB*  
Director of Government Relations

Re: AARP Tax Aide Program

During testimony on House Bill <sup>3640</sup>~~3460~~ the committee asked for Oregon-specific information regarding AARP's Tax Aide program.

In Oregon there are approximately 1100 tax aide volunteers. All volunteers must pass an IRS examination to be certified to prepare tax returns. Many of the volunteers attend 40 hours of training – returning volunteers take a 16-hour refresher course – while a few do a self study program. Oregon does not require volunteers to pass an examination related to state tax returns. However, tax aide trainers have prepared a comprehensive tax situation related to an Oregon tax return that volunteers utilize as a part of their training.

This year AARP tax aide volunteers assisted over 55,000 Oregon families or individuals in filing their federal and state tax returns. The program does not refuse anyone that has a return that volunteers are trained to handle. Nearly all of the 55,000 returns – actually 55,000 federal and 55,000 state – are electronically filed. There is not fee for e-filing, nor for tax preparation.

Seldom do individuals asked about refund anticipation loans; if they do, they are referred to a “professional preparer”. Individuals are informed that with e-filing they will receive a direct deposit within 10 days, or if they require a check, 3 weeks.

I hope this information is helpful. If you have additional questions, please let me know.

MEASURE: HB 3640  
EXHIBIT: 2  
HOUSE REVENUE COMMITTEE  
DATE: 4/25/11 PAGES: 1  
SUBMITTED BY: RICK BENNETT