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## **Representative Payee Responsibilities - CARES Act Economic Impact Payments**

**May 7, 2020**

As individuals begin receiving economic impact payments, there have been a lot of questions from Representative Payees for Social Security benefits like SSDI and SSI about how this money should be handled.

The following guidance has been taken directly from the Social Security Administration's website (<https://www.ssa.gov/coronavirus/>):

### **How should a representative payee use a beneficiary's economic impact payment (EIP)?**

*Date: May 1, 2020*

The EIP belongs to the Social Security or SSI beneficiary. It is not a Social Security or SSI benefit. A representative payee should discuss the EIP with the beneficiary. If the beneficiary wants to use the EIP independently, the representative payee should provide the EIP to the beneficiary. If the beneficiary asks the representative payee for assistance in using the EIP in a specific manner or saving it, the representative payee can provide that assistance outside the role of a representative payee.

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### **What responsibilities does the representative payee have in managing the beneficiary's economic impact payment (EIP)?**

*Date: May 1, 2020*

Under the Social Security Act, a representative payee is only responsible for managing Social Security or SSI benefits. An EIP is not such a benefit. A representative payee should discuss the EIP with the beneficiary. If the beneficiary wants to use the EIP independently, the representative payee should provide the EIP to the beneficiary. If the beneficiary asks the representative payee for assistance in



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using the EIP in a specific manner or saving it, the representative payee can provide that assistance outside the role of a representative payee.

### **Payment Amounts and General Eligibility**

- \$1,200 per person (\$2,400 for married joint filers), unless they are claimed as a dependent on someone else's return
  - Plus \$500 per each eligible dependent under 17
  - Paid as an advanced credit against 2020 federal income tax liability
  - Payable to people with adjusted gross income (AGI) of up to \$75,000 for individuals, \$112,500 for heads of households, and \$150,000 for married joint filers
  - Reduced by \$5 for every \$100 of adjusted gross income (AGI) above limits
  - Based on income thresholds
  - Not subject to federal income tax
  - Paid by direct deposit if banking information is on file with the Treasury Department (from prior tax return, for example); otherwise, paper check will be mailed
    - Direct deposit is recommended as there are potential delays related to issuing paper checks; however, paper checks remain a valid way of receiving payments.
- A Social Security number must be provided for any person, married couple, or dependent child to receive payment (limited exceptions)

### **Exclusions**

Payments are not available for:

- Nonresident aliens
- Individuals who could be claimed as dependents by other taxpayers
- Dependents 17 years of age and older
- Estates
- Trusts



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For additional information about the EIP, please visit  
<https://www.irs.gov/coronavirus/economic-impact-payments>.

Questions? Please contact:

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