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SB 677 Comptroller – Electronic Tax and Fee Return Filing Requirements
House Ways and Means Committee
FAVORABLE
March 26, 2024

Good afternoon, Chair Atterbeary and members of the House Ways and Means Committee. I am Tammy Bresnahan, Senior Director of Advocacy for AARP MD. On behalf of our more than 850,000 members, we would like to thank you for the opportunity to speak in support of SB 677 Comptroller – Electronic Tax and Fee Return Filing Requirements. We thank the Comptroller for bringing SB 677 to the General Assembly.

AARP is a nonpartisan, nonprofit, nationwide organization that helps people turn their goals and dreams into real possibilities, strengthens communities, and fights for the issues that matter most to families such as health care, employment and income security, retirement planning, affordable utilities, and protection from financial abuse.

SB 677 requires that returns for taxes and fees collected by the Comptroller be filed electronically, subject to certain exceptions including those who are sixty-five and meet certain income guidelines.

For some background and why AARP supports this bill beginning February 1 and continuing through April 15, AARP Foundation is providing in-person tax assistance and preparation through its Tax-Aide program — and it is completely free.

Since 1968, AARP Foundation Tax-Aide has provided free tax help to over seventy-eight million taxpayers, with a focus on older adults with low to moderate income. Tax-Aide volunteers are located nationwide and are trained and IRS-certified every year to make sure they know about and understand the latest changes and additions to the tax code.

In 2022, 774 AARP Foundation Tax-Aide volunteers helped more than 40,210 Maryland residents claim \$27,520,582 in federal refunds and \$2,751,085 state refunds at 127 sites in Maryland, including senior centers, libraries, and other convenient locations.

Taxpayers who used AARP Foundation Tax-Aide avoided tax preparation fees and pitches for high-interest tax credit or refund loans. The program is offered to all Marylanders 50 and over. AARP membership is not required.

AARP believes that this bill will streamline filing tax returns and fees. We appreciate the carve out for Marylanders 65 and older and who meet certain income guidelines. A recent AARP survey found that two-thirds of adults age 50 and up express an interest in recent technologies, 2

in 5 do not feel technology is designed for all ages, citing its complexity, poor user experiences and insufficient training materials. Many continue to have concerns about trust and privacy. We support the Comptroller in her efforts to modernize tax and fee collection, but we also realize that some older filers, would rather file them in person.

We respectfully request a favorable report for SB 677. If you have questions or need further clarification, please contact me at tbresnahan@arp.org or by calling 410-302-8451.