**Presentation Outline**

**NO DASHBOARD YET….**

1. **JOHN: First, we’re answering your questions….**
   1. **What % of tax returns** filed are from elderly, low income Americans? (plot 1 + map)
   2. What’s the distribution by state for Single/Joint/Head of Household, and how do these compare to the US as a whole?

*…* ***Media*** *will be covering that for you today*

* 1. Show the active vs. passive income by state, and compare it to the U.S. as a whole.

*…* ***Ben*** *will be covering*

1. **WALK THROUGH DASHBOARD** (w/hidden section)
   1. **What % of tax returns** filed are from elderly, low income Americans? (plot 1 + map)
   2. **MEDIA:** Walk-thru charts
   3. **BEN:** Walk-thru charts
   4. **LORI….** We also thought of one other metric that may be helpful… TCE… ***TCE good distillation of elderly who are low income****, and between $1 and $50k.*
2. **Dashboard reveal** / show 4 levels of need. Use Utah as example: Can be misleading to rely only on percentages… helpful to also look at number of filers
3. **CONCLUSION:** We’d like to set up a time to meet in a couple days to see how these are working. If you have questions before then feel free to contact our fearless leaders… Mary van Valkenberg or Masesh Rao for additional assistance.