Electronic Filing Instructions for your 2009 Federal Tax Return Important: Your taxes are not finished until all required steps are completed.


Benjamin D Sanders

| Balance <br> Due/ <br> Refund | Your federal tax return (Form 1040) shows a refund due to you in the amount of $\$ 986.00$. Applicable fees were deducted from your original refund amount of $\$ 986.00$. Your refund is now $\$ 936.10$. Because you chose to have your TurboTax fees deducted from your refund, you will receive e-mail from Santa Barbara Tax Products Group, LLC (SBTP), which handles this transaction. Your tax refund should be direct deposited into your account within 8 to 14 days after your return is accepted. The account information you entered - Account Number: Routing Transit Number: |
| :---: | :---: |
| Where's My Refund? | Before you call the Internal Revenue Service with questions about your refund, give them 8 to 14 days processing time from the date your return is accepted. If then you have not received your refund, or the amount is not what you expected, contact the Internal Revenue Service directly at 1-800-829-4477. You can also check www.irs.gov and select the "Where's my refund?" link. |
| No <br> Signature <br> Document <br> Needed | No signature form is required since you signed your return electronically. |
| What You Need to Keep | ```Your Electronic Filing Instructions (this form) Printed copy of your federal return``` |
| 2009 | Adjusted Gross Income \$ 50,139.00 |
| Federal | Taxable Income \$ 37,400.00 |
| Tax | Total Tax \$ 5,408.00 |
| Return | Total Payments/Credits \$ 6,394.00 |
| Summary | Amount to be Refunded \$ <br> Effective Tax Rate $10.79 \%$ |

## whboce

Hi Benjamin,

We just want to thank you for using TurboTax this year! It's our goal to make your taxes easy and accurate, year after year.

## With TurboTax Premier:

Your Head Start On Next Year:
When you come back next year, taxes will be so easy! All your information will be saved and ready to transfer in to your new return. We'll ask you questions about what changed since we last talked, and we'll be ready to get you the credits and deductions you deserve, no matter what life throws at you.

Here's the final wrap up for your 2009 taxes:
Your federal refund is: \$ 986.00

We reviewed over 350 deductions and credits so you can be sure you didn't miss a thing, and that you got the maximum refund - guaranteed.
Your Deductions and Credits:

Your itemized deductions for this year: \$9,089.00
Your Guarantee of Accuracy:
Breathe easy. The calculations on your return are backed with our
100\% Accuracy Guarantee.

- We double checked your return for errors along the way.
- We helped with step-by-step guidance to get your answers on the right IRS forms.
- If you sold investments, our Cost Basis Lookup calculated cost basis for those sales.
- We helped you out with extra guidance for rental property income, expenses, and refinancing.
- We made sure you didn't miss a deduction even if something in your life changed, like a new job, new house - or more kids!
Also included:
- We e-filed your federal returns for free, so you could get your refund in as few as 8 days.
- We provide the Audit Support Center free of charge, in the unlikely event you get audited.

Many happy returns from TurboTax.




Department of the Treasury Internal Revenue Service
Your name

- Attach to Form 1040 or Form 1040NR.



## You Can Use This Form Only if All of the Following Apply.

- You are an employee deducting ordinary and necessary expenses attributable to your job. An ordinary expense is one that is common and accepted in your field of trade, business, or profession. A necessary expense is one that is helpful and appropriate for your business. An expense does not have to be required to be considered necessary.
- You do not get reimbursed by your employer for any expenses (amounts your employer included in box 1 of your Form W-2 are not considered reimbursements for this purpose).
- If you are claiming vehicle expense, you are using the standard mileage rate for 2009.

Caution: You can use the standard mileage rate for 2009 only if: (a) you owned the vehicle and used the standard mileage rate for the
first year you placed the vehicle in service, or (b) you leased the vehicle and used the standard mileage rate for the portion of the lease period after 1997.

## Part I Figure Your Expenses

| 1 | Vehicle expense using the standard mileage rate. Complete Part II and multiply line 8a by $55{ }^{\text {c ( }}$ (55) | 1 | 8,147. |
| :---: | :---: | :---: | :---: |
| 2 | Parking fees, tolls, and transportation, including train, bus, etc, that did not involve overnight travel or commuting to and from work | 2 |  |
| 3 | Travel expense while away from home overnight, including lodging, airplane, car rental, etc. Do not include meals and entertainment | 3 |  |
| 4 | Business expenses not included on lines 1 through 3. Do not include meals and entertainment | 4 |  |
| 5 | Meals and entertainment expenses: \$ $\qquad$ x 50\% (.50) (Employees subject to Department of Transportation (DOT) hours of service limits: Multiply meal expenses incurred while away from home on business by $80 \%(.80)$ instead of $50 \%$. For details, see instructions.) | 5 |  |
| 6 | Total expenses. Add lines 1 through 5. Enter here and on Schedule A (Form 1040), line 21 (or on Schedule A (Form 1040NR), line 9). (Armed Forces reservists, fee-basis state or local government officials, qualified performing artists, and individuals with disabilities: See the instructions for special rules on where to enter this amount.) | 6 | 8,147. |

## Part II Information on Your Vehicle. Complete this part only if you are claiming vehicle expense on line 1.

7 When did you place your vehicle in service for business use? (month, day, year) . . . . . . . . . . . . . . . . . . . . . . . . 02/01/2008
8 Of the total number of miles you drove your vehicle during 2009, enter the number of miles you used your vehicle for:

9 Was your vehicle available for personal use during off-duty hours? . . . . . . . . . . . . . . . . . . . . . . . . . . X Yes $\square$ No
10 Do you (or your spouse) have another vehicle available for personal use? . . . . . . . . . . . . . . . . . . . . . . $\square$ Yes X No
11 a Do you have evidence to support your deduction? . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . X Yes $\square$ No
b If 'Yes,' is the evidence written? . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . X Yes $\square$ No
BAA For Paperwork Reduction Act Notice, see separate instructions. Form 2106-EZ (2009)

Department of the Treasury

Before you begin Part I: Figure the amount of any credit for the elderly or the disabled you are claiming

| Part I Nonbusiness Energy Property Credit (See instructions before completing this part.) |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 1 Were the qualified energy efficiency improvements or residential energy property costs for your main home located in the United States? (see instructions). |  |  |  | 1 | X Yes | No |
| Caution: If you checked the 'No' box, you cannot claim the nonbusiness energy property credit. Do not complete Part I. |  |  |  |  |  |  |
| 2 Qualified energy efficiency improvements (see instructions). |  |  |  |  |  |  |
| a Insulation material or system specifically and primarily designed to reduce the heat loss or gain of your home |  |  |  | 2a |  | 453. |
| b Exterior windows (including certain storm windows) and skylights . <br> c Exterior doors (including certain storm doors) |  |  |  | 2b |  |  |
|  |  |  |  | 2 c |  |  |
| c Exterior doors (including certain storm doors) <br> d Metal roof with appropriate pigmented coatings, or asphalt roof with appropriate cooling granules, that are specifically and primarily designed to reduce the heat gain of your home, and the roof meets or exceeds the Energy Star program requirements in effect at the time of purchase or installation. |  |  |  | 2d |  |  |
| 3 Residential energy property costs (see instructions). |  |  |  |  |  |  |
| a Energy-efficient building property . . . . . . . . . . |  |  |  | 3 a |  |  |
| b Qualified natural gas, propane, or oil furnace or hot water boiler |  |  |  | 3b |  |  |
| c Advanced main air circulating fan used in a natural gas, propane, or oil furnace. |  |  |  | 3 c |  |  |
| 4 Ad | Add lines 2a through 3c |  |  | 4 |  | 453. |
| 5 M | Multiply line 4 by $30 \%$ (.30) |  |  | 5 |  | 136. |
| 6 M | Maximum credit amount. (If you jointly occupied the home, see instructions) |  |  | 6 |  | 1,500. |
|  | Enter the smaller amount of line 5 or line 6 |  |  | 7 |  | 136. |
|  | Enter the amount from Form 1040, line 46, or Form 1040NR, line 43 | 8 |  |  |  |  |
|  | Enter the total, if any, of your credits from Form 1040, lines 47 through 50, and Schedule R, line 24; or Form 1040NR, lines 44 through 46 | 9 |  |  |  |  |
| 10 S | Subtract line 9 from line 8 . If zero or less, stop. You cannot take the nonbusiness energy property credit Nonbusiness energy property credit. Enter the smaller of line 7 or line 10 |  |  | 10 |  | 5,544. |
| $\qquad$ BAA For Paperwork Reduction Act Notice, see separate instructions. |  |  |  |  |  | 136. |
|  |  |  |  |  |  |  |  | Form | 695 (2009) |

## Before you begin Part II:

Figure the amount of any of the following credits you are claiming.

- Credit for the elderly or the disabled.
- District of Columbia first-time homebuyer credit.
- Alternative motor vehicle credit.
- Qualified plug-in electric vehicle credit.
- Qualified plug-in electric drive motor vehicle credit.


## Part II Residential Energy Efficient Property Credit (See instructions before completing this part.)

Note. Skip lines 12 through 21 if you only have a credit carryforward from 2008.

| 12 | Qualified solar electric property costs | 12 |  |
| :---: | :---: | :---: | :---: |
| 13 | Qualified solar water heating property costs. | 13 |  |
| 14 | Qualified small wind energy property costs | 14 |  |
| 15 | Qualified geothermal heat pump property costs | 15 |  |
| 16 | Add lines 12 through 15 | 16 |  |
| 17 | Multiply line 16 by $30 \%$ (.30) | 17 |  |
| 18 | Qualified fuel cell property costs . . . . . . . . . . . . . . . . . . . . . . . . . . 18 |  |  |
| 19 | Multiply line 18 by $30 \%$ (.30) . . . . . . . . . . . . . . . . . . . . . . . . . . . 19 |  |  |
| 20 | Kilowatt capacity of property on line 18 above $\quad$ - \$1, 000. . 20 |  |  |
| 21 | Enter the smaller of line 19 or line 20 | 21 |  |
| 22 | Credit carryforward from 2008. Enter the amount, if any, from your 2008 Form 5695, line 28 | 22 |  |
| 23 | Add lines 17, 21, and 22 | 23 |  |
| 24 | Enter the amount from Form 1040, line 46, or Form 1040NR, line 43 . . . . . . . 24 |  |  |
| 25 | 1040 filers: Enter the total, if any, of your credits from Form 1040, lines 47 through 50; line 11 of this form; line 12 of the Line 11 Worksheet in Pub 972 (see instructions); Form 8396, line 11; Form 8839, line 18; Form 8859, line 11; Form 8834, line 22; Form 8910, line 21 ; Form 8936, line 14; and Schedule R, line 24. |  |  |
|  | 1040NR filers: Enter the amount, if any, from Form 1040NR, lines 44 through 46 ; line 11 of this form; line 12 of the Line 11 worksheet in Pub 972 (see instructions); Form 8396, line 11; Form 8839, line 18, Form 8859, line 11; Form 8834, line 22; Form 8910, line 21; and Form 8936, line 14. |  |  |
| 26 | Subtract line 25 from line 24. If zero or less, enter -0- here and on line 27 | 26 |  |
| 27 | Residential energy efficient property credit. Enter the smaller of line 23 or line 26 | 27 |  |
| 28 | Credit carryforward to 2010. If line 27 is less than line 23, subtract line 27 from $\square$ line 23 |  |  |

## Part III Current Year Residential Energy Credits

29 Add lines 11 and 27. Enter the result here and on Form 1040, line 52, or Form 1040NR, line 48, and check box c on that line

## Making Work Pay and Government Retiree Credits

- Attach to Form 1040A, 1040, or 1040NR.
- See separate instructions.
Name(s) shown on return
Benjamin D Sanders

*If you are filing Form 2555, 2555-EZ, or 4563 or you are excluding income from Puerto Rico, see instructions.
BAA For Paperwork Reduction Act Notice, see Form 1040A, 1040, or 1040NR instructions.

FEDERAL RETURN SUBMITTED: January 30, 2010 05:05 AM PST FEDERAL RETURN ACCEPTANCE DATE:

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Your return was electronically transmitted on 01/30/2010
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The Intuit Electronic Postmark shows the date and time Intuit received your federal tax return. The Intuit Electronic Postmark documents the filing date of your income tax return, and the electronic postmark information should be kept on file with your tax return and other tax-related documentation.

There are two important aspects of the Intuit Electronic Postmark:

1. THE INTUIT ELECTRONIC POSTMARK.

The electronic postmark shows the date and time Intuit received the federal return, and is deemed the filing date if the date of the electronic postmark is on or before the date prescribed for filing of the federal individual income tax return.

TIMELY FILING:
For your federal return to be considered filed on time, your return must be postmarked on or before midnight April 15, 2010. Intuit's electronic postmark is issued in the Pacific Time (PT) zone. If you are not filing in the PT zone, you will need to add or subtract hours from the Intuit Electronic Postmark time to determine your local postmark time. For example, if you are filing in the Eastern Time (ET) zone and you electronically file your return at 9 AM on April 15, 2010, your Intuit electronic postmark will indicate April 15, 2010, 6 AM. If your federal tax return is rejected, the $I R S$ still considers it filed on time if the electronic postmark is on or before April 15, 2010, and a corrected return is submitted and accepted before April 20, 2010. If your return is submitted after April 20, 2010, a new time stamp is issued to reflect that your return was submitted after the IRS deadine and, consequently, is no longer considered to have been filed on time.

If you request an automatic six-month extension, your return must be electronically postmarked by midnight October 15, 2010. If your federal tax return is rejected, the $I R S$ will still consider it filed on time if the electronic postmark is on or before October 15, 2010, and the corrected return is submitted and accepted by October 20, 2010.
2. THE ACCEPTANCE DATE.

Once the IRS accepts the electronically filed return, the acceptance date will be provided by the Intuit Electronic Filing Center. This date is proof that the IRS accepted the electronically filed return.

