

# File by Mail Instructions for your Federal Amended Tax Return

Important: Your taxes are not finished until all required steps are completed.



Tiffany A Linke  
2808 Sarah Drive  
Pantego, TX 76013

<b>Balance Due/Refund</b>	Your federal amended tax return shows you are due a refund of \$2,166.00 The IRS estimates it will take up to 16 weeks to process your amended tax return. Your refund will be mailed to you		
<b>What You Need to Mail</b>	<p>Your amended tax return - Form 1040X. Remember to sign and date the return.</p> <p>Be sure to attach all forms or schedules that changed to your amended return.</p> <p>Mail your return and attachments to: Department of the Treasury Internal Revenue Service Center Austin, TX 73301</p> <p>Note: Your state return may be due on a different date. Please review your state filing instructions.</p> <p>Don't forget correct postage on the envelope.</p>		
<b>What You Need to Keep</b>	Keep these instructions and a copy of your return for your records. If you did not print one before closing TurboTax, go back to the program and select File tab, then select the Print for Your Records category.		
<b>Federal Tax Return Summary</b>	Adjusted Gross Income Correct Amount	\$	17,124.00
	Taxable Income Correct Amount	\$	-3,826.00
	Total Tax Correct Amount	\$	0.00
	Total Payments/Credits Correct Amount	\$	6,460.00
	Amount to be Refunded	\$	2,166.00



Hi Tiffany,

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 Deluxe:

Your Head Start On Next Year:

When you come back next year, taxes will be so easy! We'll have all your information 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 2014 taxes:

Your federal refund is: \$ 2,166.00

You qualified for these important credits:

- Child Tax Credit
- Earned Income Credit

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.
- 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 the fastest way possible.
- We provide the Audit Support Center free of charge, in the unlikely event you get audited.

Many happy returns from TurboTax.

**Amended U.S. Individual Income Tax Return**

OMB No. 1545-0074

► **Information about Form 1040X and its separate instructions is at [www.irs.gov/form1040x](http://www.irs.gov/form1040x).****This return is for calendar year** ☒ 2014 ☐ 2013 ☐ 2012 ☐ 2011**Other year.** Enter one: calendar year or fiscal year (month and year ended):

Your first name and initial

Tiffany A

Last name

Linke

Your social security number

431-51-5564

If a joint return, spouse's first name and initial

Last name

Spouse's social security number

Current home address (number and street). If you have a P.O. box, see instructions.

2808 Sarah Drive

Apt. no.

Your phone number

(817) 526-8645

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).

Pantego TX 76013

Foreign country name

Foreign province/state/county

Foreign postal code

**Amended return filing status.** You must check one box even if you are not changing your filing status. **Caution.** In general, you cannot change your filing status from joint to separate returns after the due date.☐ Single☐ Married filing separately☐ Qualifying widow(er)☒ Head of household (If the qualifying person is a child but not your dependent, see instructions.)☐ Married filing jointly**Full-year coverage.**

If all members of your household have full-year minimal essential health care coverage, check "Yes." Otherwise, check "No." (See instructions.)

☒ Yes☐ No

Use Part III on the back to explain any changes

**Income and Deductions**

		A. Original amount or as previously adjusted (see instructions)	B. Net change— amount of increase or (decrease)— explain in Part III	C. Correct amount
<b>1</b>	Adjusted gross income. If net operating loss (NOL) carryback is included, check here . . . . . ► <input type="checkbox"/>	<b>1</b> 17,124.	0.	17,124.
<b>2</b>	Itemized deductions or standard deduction . . . . .	<b>2</b> 9,100.	0.	9,100.
<b>3</b>	Subtract line 2 from line 1 . . . . .	<b>3</b> 8,024.	0.	8,024.
<b>4</b>	Exemptions. <b>If changing, complete Part I on page 2 and enter the amount from line 29</b> . . . . .	<b>4</b> 7,900.	3,950.	11,850.
<b>5</b>	Taxable income. Subtract line 4 from line 3 . . . . .	<b>5</b> 124.	-3,950.	-3,826.

**Tax Liability**

<b>6</b>	Tax. Enter method(s) used to figure tax (see instructions): Table	<b>6</b> 11.	-11.	0.
<b>7</b>	Credits. If general business credit carryback is included, check here. . . . . ► <input type="checkbox"/>	<b>7</b> 11.	-11.	0.
<b>8</b>	Subtract line 7 from line 6. If the result is zero or less, enter -0- . . . .	<b>8</b> 0.	0.	0.
<b>9</b>	Health care: individual responsibility (see instructions) . . . . .	<b>9</b> 0.	0.	0.
<b>10</b>	Other taxes . . . . .	<b>10</b> 0.	0.	0.
<b>11</b>	Total tax. Add lines 8, 9, and 10 . . . . .	<b>11</b> 0.	0.	0.

**Payments**

<b>12</b>	Federal income tax withheld and excess social security and tier 1 RRTA tax withheld ( <b>if changing</b> , see instructions) . . . . .	<b>12</b> 0.	0.	0.
<b>13</b>	Estimated tax payments, including amount applied from prior year's return . . . . .	<b>13</b> 0.	0.	0.
<b>14</b>	Earned income credit (EIC) . . . . .	<b>14</b> 3,305.	2,155.	5,460.
<b>15</b>	Refundable credits from: <input type="checkbox"/> Schedule 8812 Form(s) <input type="checkbox"/> 2439 <input type="checkbox"/> 4136 <input type="checkbox"/> 5405 <input type="checkbox"/> 8801 <input type="checkbox"/> 8812 (2011) <input type="checkbox"/> 8839 <input type="checkbox"/> 8863 <input type="checkbox"/> 8885 <input type="checkbox"/> 8962 or <input type="checkbox"/> other (specify):	<b>15</b> 989.	11.	1,000.
<b>16</b>	Total amount paid with request for extension of time to file, tax paid with original return, and additional tax paid after return was filed . . . . .	<b>16</b>	0.	
<b>17</b>	Total payments. Add lines 12 through 16 . . . . .	<b>17</b>	6,460.	

**Refund or Amount You Owe (Note. Allow up to 16 weeks for Form 1040X to be processed.)**

<b>18</b>	Overpayment, if any, as shown on original return or as previously adjusted by the IRS. . . . .	<b>18</b>	4,294.
<b>19</b>	Subtract line 18 from line 17 (If less than zero, see instructions) . . . . .	<b>19</b>	2,166.
<b>20</b>	<b>Amount you owe.</b> If line 11, column C, is more than line 19, enter the difference . . . . .	<b>20</b>	
<b>21</b>	If line 11, column C, is less than line 19, enter the difference. This is the amount <b>overpaid</b> on this return	<b>21</b>	2,166.
<b>22</b>	Amount of line 21 you want <b>refunded to you</b> . . . . .	<b>22</b>	2,166.
<b>23</b>	Amount of line 21 you want <b>applied to your (enter year):</b> estimated tax . <b>23</b>		

Complete and sign this form on Page 2.

**Part I Exemptions**

Complete this part **only** if you are increasing or decreasing the number of exemptions (personal and dependents) claimed on line 6d of the return you are amending.

See Form 1040 or Form 1040A instructions and Form 1040X instructions.

		A. Original number of exemptions or amount reported or as previously adjusted	B. Net change	C. Correct number or amount
<b>24</b>	Yourself and spouse. <b>Caution.</b> If someone can claim you as a dependent, you cannot claim an exemption for yourself . . . . .	<b>24</b> 1	0	1
<b>25</b>	Your dependent children who lived with you . . . . .	<b>25</b> 1	1	2
<b>26</b>	Your dependent children who did not live with you due to divorce or separation	<b>26</b> 0	0	0
<b>27</b>	Other dependents . . . . .	<b>27</b> 0	0	0
<b>28</b>	Total number of exemptions. Add lines 24 through 27 . . . . .	<b>28</b> 2	1	3
<b>29</b>	Multiply the number of exemptions claimed on line 28 by the exemption amount shown in the instructions for line 29 for the year you are amending. Enter the result here and on line 4 on page 1 of this form. . .	<b>29</b> 7,900.	3,950.	11,850.
<b>30</b>	List <b>ALL</b> dependents (children and others) claimed on this amended return. If more than 4 dependents, see instructions.			

(a) First name	Last name	(b) Dependent's social security number	(c) Dependent's relationship to you	(d) Check box if qualifying child for child tax credit (see instructions)
Marissa C	Powell	633-19-5422	Daughter	<input checked="" type="checkbox"/>
Jessie E	Ames	485-25-0045	Daughter	<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

**Part II Presidential Election Campaign Fund**

Checking below will not increase your tax or reduce your refund.

- ☐ Check here if you did not previously want \$3 to go to the fund, but now do.
- ☐ Check here if this is a joint return and your spouse did not previously want \$3 to go to the fund, but now does.

**Part III Explanation of changes.** In the space provided below, tell us why you are filing Form 1040X.

► Attach any supporting documents and new or changed forms and schedules.

My daughter's grandmother claimed my daughter after a one month vacation stay. She did not have permission to claim her.  
 My daughter lived with me the entire year and I supported her the entire year.  
 My daughter died while on vacation due to direct actions of her grandmother.

**Sign Here**

**Remember to keep a copy of this form for your records.**

Under penalties of perjury, I declare that I have filed an original return and that I have examined this amended return, including accompanying schedules and statements, and to the best of my knowledge and belief, this amended return is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information about which the preparer has any knowledge.

► Your signature \_\_\_\_\_ Date \_\_\_\_\_ ► Spouse's signature. If a joint return, **both** must sign. \_\_\_\_\_ Date \_\_\_\_\_

**Paid Preparer Use Only**

► Preparer's signature \_\_\_\_\_ Date \_\_\_\_\_ Self-prepared  
 Firm's name (or yours if self-employed) \_\_\_\_\_

Print/type preparer's name \_\_\_\_\_ Firm's address and ZIP code \_\_\_\_\_

PTIN \_\_\_\_\_ ☐ Check if self-employed \_\_\_\_\_ Phone number \_\_\_\_\_ EIN \_\_\_\_\_

Your first name and initial  Tiffany A	Last name  Linke	OMB No. 1545-0074 <b>Your social security number</b> 431 51 5564
If a joint return, spouse's first name and initial	Last name	<b>Spouse's social security number</b>

Home address (number and street). If you have a P.O. box, see instructions. 2808 Sarah Drive		Apt. no.	▲ Make sure the SSN(s) above and on line 6c are correct.
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). Pantego TX 76013			<b>Presidential Election Campaign</b> Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse
Foreign country name	Foreign province/state/county	Foreign postal code	

**Filing status** Check only one box.

<b>1</b> <input type="checkbox"/> Single <b>2</b> <input type="checkbox"/> Married filing jointly (even if only one had income) <b>3</b> <input type="checkbox"/> Married filing separately. Enter spouse's SSN above and full name here. ▶	<b>4</b> <input checked="" type="checkbox"/> Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶ <b>5</b> <input type="checkbox"/> Qualifying widow(er) with dependent child (see instructions)
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**Exemptions**

**6a** ☒ **Yourself.** If someone can claim you as a dependent, **do not** check box 6a.

**b** ☐ **Spouse**

**c Dependents:**

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> if child under age 17 qualifying for child tax credit (see instructions)
Marissa C	Powell	633-19-5422	Daughter	<input checked="" type="checkbox"/>
Jessie E	Ames	485-25-0045	Daughter	<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

If more than six dependents, see instructions.

**Boxes checked on 6a and 6b** 1

**No. of children on 6c who:**

• **lived with you** 2

• **did not live with you due to divorce or separation (see instructions)**  

**Dependents on 6c not entered above**  

**Add numbers on lines above ▶** **3**

**d** Total number of exemptions claimed.

**Income**

<b>7</b> Wages, salaries, tips, etc. Attach Form(s) W-2.	HSH 1435	7	17,124.
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**Attach Form(s) W-2 here. Also attach Form(s) 1099-R if tax was withheld.**

<b>8a</b> Taxable interest. Attach Schedule B if required.	8a
<b>b</b> Tax-exempt interest. <b>Do not</b> include on line 8a.	8b
Ordinary dividends. Attach Schedule B if required.	9a
<b>b</b> Qualified dividends (see instructions).	9b
<b>10</b> Capital gain distributions (see instructions).	10
<b>11a</b> IRA distributions.	11a
<b>11b</b> Taxable amount (see instructions).	11b
<b>12a</b> Pensions and annuities.	12a
<b>12b</b> Taxable amount (see instructions).	12b
<b>13</b> Unemployment compensation and Alaska Permanent Fund dividends.	13
<b>14a</b> Social security benefits.	14a
<b>14b</b> Taxable amount (see instructions).	14b
<b>15</b> Add lines 7 through 14b (far right column). This is your <b>total income</b> .	15
	17,124.

**Adjusted gross income**

<b>16</b> Educator expenses (see instructions).	16
<b>17</b> IRA deduction (see instructions).	17
<b>18</b> Student loan interest deduction (see instructions).	18
<b>19</b> Tuition and fees. Attach Form 8917.	19
<b>20</b> Add lines 16 through 19. These are your <b>total adjustments</b> .	20
<b>21</b> Subtract line 20 from line 15. This is your <b>adjusted gross income</b> .	21
	17,124.

<b>Tax, credits, and payments</b>	<b>22</b>	Enter the amount from line 21 (adjusted gross income).	22	17,124.
	<b>23a</b>	Check <input type="checkbox"/> <b>You</b> were born before January 2, 1950, <input type="checkbox"/> <b>Blind</b> } <b>Total boxes</b> if: <input type="checkbox"/> <b>Spouse</b> was born before January 2, 1950, <input type="checkbox"/> <b>Blind</b> } <b>checked</b> ▶ <b>23a</b> <input type="checkbox"/>		
	<b>b</b>	If you are married filing separately and your spouse itemizes deductions, check here ▶ <b>23b</b> <input type="checkbox"/>		
	<b>24</b>	Enter your <b>standard deduction</b> .	24	9,100.
	<b>25</b>	Subtract line 24 from line 22. If line 24 is more than line 22, enter -0-.	25	8,024.
	<b>26</b>	<b>Exemptions.</b> Multiply \$3,950 by the number on line 6d.	26	11,850.
	<b>27</b>	Subtract line 26 from line 25. If line 26 is more than line 25, enter -0-.	27	0.
	<b>28</b>	<b>Tax</b> , including any alternative minimum tax (see instructions).	28	0.
	<b>29</b>	Excess advance premium tax credit repayment. Attach Form 8962.	29	
	<b>30</b>	Add lines 28 and 29.	30	0.
<b>Standard Deduction for—</b> • People who check any box on line 23a or 23b or who can be claimed as a dependent, see instructions. • All others: Single or Married filing separately, \$6,200 Married filing jointly or Qualifying widow(er), \$12,400 Head of household, \$9,100	<b>31</b>	Credit for child and dependent care expenses. Attach Form 2441.	31	
	<b>32</b>	Credit for the elderly or the disabled. Attach Schedule R.	32	
	<b>33</b>	Education credits from Form 8863, line 19.	33	
	<b>34</b>	Retirement savings contributions credit. Attach Form 8880.	34	
	<b>35</b>	Child tax credit. Attach Schedule 8812, if required.	35	0.
	<b>36</b>	Add lines 31 through 35. These are your <b>total credits</b> .	36	0.
	<b>37</b>	Subtract line 36 from line 30. If line 36 is more than line 30, enter -0-.	37	0.
	<b>38</b>	Health care: individual responsibility (see instructions). Full-year coverage <input checked="" type="checkbox"/>	38	
	<b>39</b>	Add line 37 and line 38. This is your <b>total tax</b> .	39	0.
	<b>40</b>	Federal income tax withheld from Forms W-2 and 1099.	40	
<b>Refund</b>  Direct deposit? See instructions and fill in 48b, 48c, and 48d or Form 8888.	<b>41</b>	2014 estimated tax payments and amount applied from 2013 return.	41	
	<b>42a</b>	<b>Earned income credit (EIC).</b>	42a	5,460.
	<b>b</b>	Nontaxable combat pay election. <b>42b</b>		
	<b>43</b>	Additional child tax credit. Attach Schedule 8812.	43	1,000.
	<b>44</b>	American opportunity credit from Form 8863, line 8.	44	
	<b>45</b>	Net premium tax credit. Attach Form 8962.	45	
	<b>46</b>	Add lines 40, 41, 42a, 43, 44, and 45. These are your <b>total payments</b> .	46	6,460.
	<b>47</b>	If line 46 is more than line 39, subtract line 39 from line 46. This is the amount you <b>overpaid</b> .	47	6,460.
	<b>48a</b>	Amount of line 47 you want <b>refunded to you</b> . If Form 8888 is attached, check here ▶ <input type="checkbox"/>	48a	6,460.
	<b>b</b>	Routing number <input type="text" value="114924742"/> ▶ <b>c</b> Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings		
<b>d</b>	Account number <input type="text" value="98246789796100000000"/>			
<b>49</b>	Amount of line 47 you want <b>applied to your 2015 estimated tax</b> .	49		
<b>Amount you owe</b>	<b>50</b>	<b>Amount you owe.</b> Subtract line 46 from line 39. For details on how to pay, see instructions.	50	
	<b>51</b>	Estimated tax penalty (see instructions).	51	

**Third party designee** Do you want to allow another person to discuss this return with the IRS (see instructions)? ☐ **Yes**. Complete the following. ☒ **No**

Designee's name ▶	Phone no. ▶	Personal identification number (PIN) ▶
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**Sign here** Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately list all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records. ▶	Your signature	Date	Your occupation <b>Entertainer</b>	Daytime phone number <b>(817) 526-8645</b>
	Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

<b>Paid preparer use only</b>	Print/type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶ <b>Self-Prepared</b>			Firm's EIN ▶	
	Firm's address ▶			Phone no.	

**SCHEDULE EIC**  
**(Form 1040A or 1040)**Department of the Treasury  
Internal Revenue Service (99)

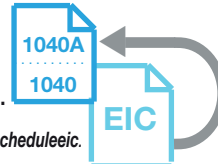
Name(s) shown on return

Tiffany A Linke

**Earned Income Credit**

## Qualifying Child Information

- ▶ **Complete and attach to Form 1040A or 1040 only if you have a qualifying child.**
- ▶ **Information about Schedule EIC (Form 1040A or 1040) and its instructions is at [www.irs.gov/scheduleeic](http://www.irs.gov/scheduleeic).**



OMB No. 1545-0074

**2014**Attachment  
Sequence No. **43****Your social security number**

431-51-5564

**Before you begin:**

- See the instructions for Form 1040A, lines 42a and 42b, or Form 1040, lines 66a and 66b, to make sure that **(a)** you can take the EIC, and **(b)** you have a qualifying child.
- Be sure the child's name on line 1 and social security number (SSN) on line 2 agree with the child's social security card. Otherwise, at the time we process your return, we may reduce or disallow your EIC. If the name or SSN on the child's social security card is not correct, call the Social Security Administration at 1-800-772-1213.



- If you take the EIC even though you are not eligible, you may not be allowed to take the credit for up to 10 years. See the instructions for details.
- It will take us longer to process your return and issue your refund if you do not fill in all lines that apply for each qualifying child.

**Qualifying Child Information****Child 1****Child 2****Child 3****1 Child's name**

If you have more than three qualifying children, you have to list only three to get the maximum credit.

First name Last name

Marissa C Powell

First name Last name

Jessie E Ames

First name Last name

**2 Child's SSN**

The child must have an SSN as defined in the instructions for Form 1040A, lines 42a and 42b, or Form 1040, lines 66a and 66b, unless the child was born and died in 2014. If your child was born and died in 2014 and did not have an SSN, enter "Died" on this line and attach a copy of the child's birth certificate, death certificate, or hospital medical records.

633-19-5422

485-25-0045

**3 Child's year of birth**Year 2 0 0 9

If born after 1995 and the child is younger than you (or your spouse, if filing jointly), skip lines 4a and 4b; go to line 5.

Year 1 9 9 6

If born after 1995 and the child is younger than you (or your spouse, if filing jointly), skip lines 4a and 4b; go to line 5.

Year \_\_\_\_\_

If born after 1995 and the child is younger than you (or your spouse, if filing jointly), skip lines 4a and 4b; go to line 5.

**4 a** Was the child under age 24 at the end of 2014, a student, and younger than you (or your spouse, if filing jointly)?

☐ **Yes.** ☐ **No.**  
*Go to line 5.* *Go to line 4b.*

☐ **Yes.** ☐ **No.**  
*Go to line 5.* *Go to line 4b.*

☐ **Yes.** ☐ **No.**  
*Go to line 5.* *Go to line 4b.*

**b** Was the child permanently and totally disabled during any part of 2014?

☐ **Yes.** ☐ **No.**  
*Go to line 5.* The child is not a qualifying child.

☐ **Yes.** ☐ **No.**  
*Go to line 5.* The child is not a qualifying child.

☐ **Yes.** ☐ **No.**  
*Go to line 5.* The child is not a qualifying child.

**5 Child's relationship to you**

(for example, son, daughter, grandchild, niece, nephew, foster child, etc.)

Daughter

Daughter

**6 Number of months child lived with you in the United States during 2014**

- If the child lived with you for more than half of 2014 but less than 7 months, enter "7."
- If the child was born or died in 2014 and your home was the child's home for more than half the time he or she was alive during 2014, enter "12."

12 months  
Do not enter more than 12 months.

12 months  
Do not enter more than 12 months.

           months  
Do not enter more than 12 months.

**For Paperwork Reduction Act Notice, see your tax return instructions.**

BAA

REV 12/12/14 TTO

Schedule EIC (Form 1040A or 1040) 2014



**SCHEDULE 8812**  
**(Form 1040A or 1040)**

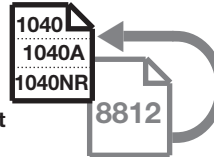
Department of the Treasury  
Internal Revenue Service (99)

Name(s) shown on return

Tiffany A Linke

# Child Tax Credit

▶ **Attach to Form 1040, Form 1040A, or Form 1040NR.**  
▶ **Information about Schedule 8812 and its separate instructions is at**  
**[www.irs.gov/schedule8812](http://www.irs.gov/schedule8812).**



OMB No. 1545-0074

**2014**

Attachment  
Sequence No. 47

Your social security number

431-51-5564

**Part I Filers Who Have Certain Child Dependent(s) with an ITIN (Individual Taxpayer Identification Number)**



Complete this part only for each dependent who has an ITIN and for whom you are claiming the child tax credit.  
If your dependent is not a qualifying child for the credit, you cannot include that dependent in the calculation of this credit.

Answer the following questions for each dependent listed on Form 1040, line 6c; Form 1040A, line 6c; or Form 1040NR, line 7c, who has an ITIN (Individual Taxpayer Identification Number) and that you indicated is a qualifying child for the child tax credit by checking column (4) for that dependent.

- A** For the first dependent identified with an ITIN and listed as a qualifying child for the child tax credit, did this child meet the substantial presence test? See separate instructions.
- ☐ Yes ☐ No
- B** For the second dependent identified with an ITIN and listed as a qualifying child for the child tax credit, did this child meet the substantial presence test? See separate instructions.
- ☐ Yes ☐ No
- C** For the third dependent identified with an ITIN and listed as a qualifying child for the child tax credit, did this child meet the substantial presence test? See separate instructions.
- ☐ Yes ☐ No
- D** For the fourth dependent identified with an ITIN and listed as a qualifying child for the child tax credit, did this child meet the substantial presence test? See separate instructions.
- ☐ Yes ☐ No

**Note.** If you have more than four dependents identified with an ITIN and listed as a qualifying child for the child tax credit, see the instructions and check here . . . . . ☐

**Part II Additional Child Tax Credit Filers**

<b>1</b>	<b>1040 filers:</b> Enter the amount from line 6 of your Child Tax Credit Worksheet (see the Instructions for Form 1040, line 52).	}	<b>1</b>	1,000.
	<b>1040A filers:</b> Enter the amount from line 6 of your Child Tax Credit Worksheet (see the Instructions for Form 1040A, line 35).			
	<b>1040NR filers:</b> Enter the amount from line 6 of your Child Tax Credit Worksheet (see the Instructions for Form 1040NR, line 49).			
If you used Pub. 972, enter the amount from line 8 of the Child Tax Credit Worksheet in the publication.				
<b>2</b>	Enter the amount from Form 1040, line 52; Form 1040A, line 35; or Form 1040NR, line 49 . . . . .	<b>2</b>	0.	
<b>3</b>	Subtract line 2 from line 1. If zero, <b>stop</b> ; you cannot take this credit . . . . .	<b>3</b>	1,000.	
<b>4a</b>	Earned income (see separate instructions) . . . . .	<b>4a</b>	17,124.	
<b>b</b>	Nontaxable combat pay (see separate instructions) . . . . .	<b>4b</b>		
<b>5</b>	Is the amount on line 4a more than \$3,000? <input type="checkbox"/> <b>No.</b> Leave line 5 blank and enter -0- on line 6. <input checked="" type="checkbox"/> <b>Yes.</b> Subtract \$3,000 from the amount on line 4a. Enter the result . . . . .	<b>5</b>	14,124.	
<b>6</b>	Multiply the amount on line 5 by 15% (.15) and enter the result . . . . . <b>Next.</b> Do you have three or more qualifying children? <input checked="" type="checkbox"/> <b>No.</b> If line 6 is zero, stop; you cannot take this credit. Otherwise, skip Part III and enter the <b>smaller</b> of line 3 or line 6 on line 13. <input type="checkbox"/> <b>Yes.</b> If line 6 is equal to or more than line 3, skip Part III and enter the amount from line 3 on line 13. Otherwise, go to line 7.	<b>6</b>	2,119.	



**Part III Certain Filers Who Have Three or More Qualifying Children**

<b>7</b>	Withheld social security, Medicare, and Additional Medicare taxes from Form(s) W-2, boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If your employer withheld or you paid Additional Medicare Tax or tier 1 RRTA taxes, see separate instructions . . . . .	<b>7</b>		
<b>8</b>	<b>1040 filers:</b> Enter the total of the amounts from Form 1040, lines 27 and 58, plus any taxes that you identified using code "UT" and entered on line 62.	<b>8</b>		
	<b>1040A filers:</b> Enter -0-.			
	<b>1040NR filers:</b> Enter the total of the amounts from Form 1040NR, lines 27 and 56, plus any taxes that you identified using code "UT" and entered on line 60.	<b>9</b>		
<b>9</b>	Add lines 7 and 8 . . . . .			
<b>10</b>	<b>1040 filers:</b> Enter the total of the amounts from Form 1040, lines 66a and 71.	<b>10</b>		
	<b>1040A filers:</b> Enter the total of the amount from Form 1040A, line 42a, plus any excess social security and tier 1 RRTA taxes withheld that you entered to the left of line 46 (see separate instructions).			
	<b>1040NR filers:</b> Enter the amount from Form 1040NR, line 67.			
<b>11</b>	Subtract line 10 from line 9. If zero or less, enter -0- . . . . .	<b>11</b>		
<b>12</b>	Enter the <b>larger</b> of line 6 or line 11 . . . . .	<b>12</b>		
	<b>Next</b> , enter the <b>smaller</b> of line 3 or line 12 on line 13.			

**Part IV Additional Child Tax Credit**

<b>13</b>	This is your additional child tax credit . . . . .	<b>13</b>	1,000.
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Enter this amount on  
Form 1040, line 67,  
Form 1040A, line 43, or  
Form 1040NR, line 64.

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## Consent to Use of Tax Return Information

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Federal law requires this consent form be provided to you. Unless authorized by law we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

If you are requesting use of personal information from a joint return, you are representing that we have consent for both parties on the return.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

The following statements apply:

I authorize Intuit, the maker of TurboTax, to use the 2014 tax return information to determine if I am eligible for certain payment options and benefits beyond my refund.

Sign this agreement by entering your name and the date below.

Tiffany  
First Name

Linke  
Last Name

01/02/2015  
Date

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## Read and accept this Disclosure Consent

This is an IRS requirement

In order to process your request for a new NetSpend Premier Visa Prepaid Card, we need to send the following information to The Bancorp Bank; to iovation, our fraud prevention processor; and to NetSpend, an Independent Sales Organization pursuant to an agreement with The Bancorp Bank: your name; street address; Social Security number; date of birth; email address; device and customer status identifiers; phone number(s); and anticipated refund amount.

We send this information via secure SSL-encrypted transmission for the sole purpose of providing you with a new NetSpend Premier Visa Prepaid Card. The Bancorp Bank and NetSpend will protect your confidentiality and use your information only in accordance with the Cardholder Agreement and Privacy Policy.

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### IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature."

If you are requesting disclosure of personal information from a joint return, you are representing that we have consent for both parties on the return.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

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To agree, enter your name and date in the boxes below and select the "I Agree" button on the bottom of the page.

*I authorize Intuit, the maker of TurboTax, to disclose to the Bancorp Bank; to iovation, the fraud prevention processor; and to NetSpend Corporation that portion of my 2014 tax return information that is necessary to enable The Bancorp Bank and NetSpend to open and administer a new NetSpend Premier Visa Prepaid Card Account.*

Please type your name below:

Tiffany

First Name

Linke

Last Name

Please type the date below:

01/08/2015

Date

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## Read and accept this Disclosure Consent

This is an IRS requirement

In order to finalize your request for this payment option, we need to send the following information to Sunrise Banks N.A. of St. Paul, Minnesota ('BANK') and to Santa Barbara Tax Products Group ('SBTPG'), the administrator and servicer of this payment option: your identifying information and your refund amount. We transmit this information using bank-level security for the sole purpose of providing you with this payment option. Both the BANK and SBTPG will protect your confidentiality and use your information only per the refund processing agreement and their privacy policies.

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### IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature."

If you are requesting disclosure of personal information from a joint return, you are representing that we have consent for both parties on the return.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

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To agree, enter your name and date in the boxes below and select the "I Agree" button on the bottom of the page.

I authorize Intuit, the maker of TurboTax, to disclose to BANK and SBTPG that portion of my 2014 tax return information that is necessary to enable BANK and SBTPG to process my refund and pay my fees.

Sign this agreement by entering your name:

Tiffany                      Linke

Please type the date below:

01/21/2015

Date

**Sunrise Banks N.A. Refund Processing Agreement ('Agreement')**

Name                      Tiffany A Linke  
 Social Security No.    431-51-5564

This Agreement contains important terms, conditions and disclosures about the processing of your refund by Sunrise Banks N.A. of St. Paul, Minnesota ('BANK'). Read this Agreement carefully before accepting its terms and conditions, and print a copy and/or retain this information electronically for future reference. As used in this Agreement, the words 'you' and 'your' refer to the applicant or both the applicant and joint applicant if the 2014 federal income tax return is a joint return (individually and collectively, 'Applicant'). The words 'we,' 'us' and 'our' refer to BANK and processor. The term 'Servicer' or 'Processor' refer to the third party processor, Santa Barbara Tax Products Group, LLC.

1. **NOTICE:** No Requirement To Have BANK Process Your Refund In Order To File Electronically. YOU UNDERSTAND THAT A REFUND PROCESSING FEE OF \$ 0.00 IS CHARGED TO ESTABLISH A TEMPORARY ACCOUNT TO RECEIVE YOUR FEDERAL TAX REFUND, TO DEDUCT YOUR TURBOTAX FEES FROM THAT ACCOUNT, AND TO FORWARD FUNDS TO YOU. THE REFUND PROCESSING FEE IS NOT A LOAN; IT IS DUE WHETHER OR NOT THE REFUND IS SUFFICIENT TO PAY THE REFUND PROCESSING FEE. THIS FEE IS COLLECTED AT THE TIME THE REFUND OCCURS. YOU CAN AVOID THIS FEE AND NOT USE THE REFUND PROCESSING SERVICE BY, INSTEAD, PAYING THE APPLICABLE TURBOTAX FEES TO INTUIT BY CREDIT OR DEBIT CARD AT THE TIME YOU FILE YOUR 2014 FEDERAL INCOME TAX RETURN AND ELECTING TO HAVE YOUR REFUND DIRECTLY DEPOSITED IN YOUR OWN BANK ACCOUNT OR MAILED TO YOU. IF YOU DO USE THE REFUND-PROCESSING SERVICE, YOU CAN EXPECT TO RECEIVE THE PROCEEDS FROM YOUR FEDERAL TAX REFUND WITHIN 21 DAYS FROM WHEN THE IRS ACCEPTS YOUR RETURN UNLESS THERE ARE PROCESSING DELAYS BY THE IRS. THE REFUND PROCESSING SERVICE WILL NEITHER SPEED UP NOR DELAY YOUR FEDERAL TAX REFUND. IF YOU DO NOT USE THE REFUND PROCESSING SERVICE, BUT DO FILE YOUR TAX RETURN ELECTRONICALLY, AND HAVE YOUR FEDERAL TAX REFUND DIRECTLY DEPOSITED INTO A BANK ACCOUNT, YOU CAN EXPECT TO RECEIVE YOUR REFUND WITHIN 21 DAYS FROM WHEN THE IRS ACCEPTS YOUR RETURN UNLESS THERE ARE PROCESSING DELAYS BY THE IRS. IF YOU ELECT TO RECEIVE YOUR FEDERAL TAX REFUND THROUGH THE MAIL, YOU CAN EXPECT TO RECEIVE YOUR REFUND IN 3 TO 4 WEEKS FROM WHEN THE IRS ACCEPTS YOUR RETURN. THE COST OF PREPARING YOUR TAX RETURN IS NOT ANY MORE OR LESS IF YOU PURCHASE THE REFUND PROCESSING SERVICE.

2. Authorization to Release Personal Information. You authorize the Internal Revenue Service ("IRS") to disclose any information to BANK and Processor related to the funding of your 2014 federal tax refund. You also authorize Intuit, as the transmitter of your electronically filed tax return, to disclose your tax return and contact information to BANK and Processor for use in connection with the refund processing services being provided pursuant to this Agreement and BANK to share your information with Intuit. Neither Intuit, BANK nor Processor will disclose or use your tax return information for any other purpose, except as permitted by law. BANK and Processor will not use your tax information or contact information for any marketing purpose. For more information concerning our privacy policy please see the disclosures at the end of this Agreement describing how BANK may use or share your personal information.

3. Summary of Terms

Expected Federal Refund . . . . .	\$ 4,294.00
Less Bank Refund Processing Fee. . . . .	\$ 0.00
Less TurboTax Fees. . . . .	\$ 34.99
Less Additional Products and Services Purchased . . . . .	\$
<b>Expected Proceeds*</b> . . . . .	<b>\$ 4,224.02</b>

\*These charges are itemized. This is only an estimate. The amount will be reduced by any applicable sales taxes, and if applicable, a returned item and other processing fee paid to Processor as set forth in paragraphs 4 and 7 below.

4. Temporary Deposit Account Authorization. You hereby authorize BANK to establish a temporary deposit account ('Deposit Account') for the purpose of receiving your tax year 2014 federal tax refund from the IRS. BANK or Servicer must receive an acknowledgment from the IRS that your return has been electronically filed and accepted for processing before the Deposit Account can be opened. You authorize BANK or Servicer to deduct from your Deposit Account the following amounts: (i) the refund processing fee; (ii) the fees and charges related to the preparation, processing and transmission of your tax return (TurboTax Fees); and (iii) amounts to pay for additional products and services purchased plus applicable taxes. You also authorize BANK to deduct twenty dollars (\$20) as a returned item processing fee from your Deposit Account in the event that your deposit is returned or you provide incorrect bank account or routing information, as set forth in the Note below paragraph 7 below. This fee shall be paid by BANK to its Processor. You authorize BANK to disburse the balance of the Deposit Account to you after making all

authorized deductions or payments. If the Deposit Account does not have sufficient funds to pay the TurboTax fees and the fees for Additional Products and Services Purchased as set forth in Section 3, (a) You authorize BANK to automatically deduct such fees (or any portion thereof) via ACH, electronic check, or wire transfer directly from the account or card in which You authorized BANK to deposit your Expected Proceeds as set forth in Section 7, and (b) if you made alternative arrangements with TurboTax for payment of such fees, those arrangements will be attempted prior to any automatic deduction.

5. Acknowledgments. (a) You understand that: (i) BANK cannot guarantee the amount of your tax year 2014 federal tax refund or the date it will be issued, and (ii) Neither BANK nor Processor is affiliated with the transmitter of the tax return (Intuit) and neither warrants the accuracy of the software used to prepare the tax return. (b) You agree that Intuit is not acting as your agent and is not under any fiduciary duty with respect to the processing of your refund by BANK and Servicer. (c) Your refund may be held or returned to the IRS if it is suspected of fraud or identity theft.

6. Truth in Savings Disclosure. The Deposit Account is being opened for the purpose of receiving your (both spouses if this is a jointly filed return) tax year 2014 federal tax refund. Processor and Bank will deduct the fees set forth in Section 3 including \$ 0.00 for opening and maintaining the Account and processing your refund. No other deposits may be made to the Deposit Account. No withdrawals will be allowed from the Deposit Account except as provided in Section 4. No interest is payable on the deposit; thus, the annual percentage yield and interest rate are 0%. The Deposit Account will be closed after all authorized deductions have been made and any remaining balance has been disbursed to you. We will also charge a Return Item Fee of \$20 if the refund cannot be delivered as directed in Section 4 of this application. An Account Research and Legal Processing fee of \$25 may be charged if we are required to provide additional processing to return the funds to the IRS. These fees will be paid by Bank to the Processor. Questions or concerns about the Deposit Account should be directed to: Sunrise Banks N.A., c/o Santa Barbara Tax Products, Group LLC, 11085 North Torrey Pines Road, Suite 210, La Jolla, CA 92037, or via the Internet at <http://cisc.sbtpg.com>.

7. Disbursement Method: You agree that the disbursement method selected below will be used by BANK to disburse funds to you.

a ☒ Direct Deposit to Prepaid Debit Card: If you choose this option, you authorize BANK to transfer the balance of your Deposit Account to the financial institution that supports your prepaid debit card, so that the financial institution may deposit the balance of your refund, as directed by you, on the respective prepaid debit card you have selected. **Additional fees may be charged for the use of the card. Please review the cardholder agreement associated with the use of your prepaid debit card provided by the participating financial institution to learn of other fees, charges, terms and conditions that will apply. BANK will not be responsible for your funds once they have been deposited with the respective financial institution.**

b ☐ Direct Deposit to Checking or Savings Account: If you choose this option, the balance of your Deposit Account will be disbursed to you electronically by ACH Direct Deposit to your personal bank account designated below. If a joint return is filed, the bank account may be a joint account or the individual account of either spouse.

**DIRECT DEPOSIT ACCOUNT TYPE:**          Checking          Savings  
**RTN #:**                      **ACCOUNT #:**                                 

**Note: To ensure that there are no delays in receiving your refund, please contact your financial institution to confirm that you are using the correct RTN (routing) and account number.** If you or your representative enter your account information incorrectly and your deposit is returned to BANK, the Deposit Account balance minus a \$20 returned item processing fee will be disbursed to you via a cashier's check mailed to your physical address of record. The BANK, its processor or Intuit is **not** responsible for the misapplication of a direct deposit that results from error, negligence or malfeasance on the part of you or your representative. In cases where the BANK has received your federal tax refund but is unable to deliver the funds directly to you, funds may be held at the BANK until claimed, or returned to the IRS or State of residency. Additional return item and processing fees may be deducted from the Deposit Account for federal tax refunds that continue to be undeliverable and unclaimed and must be returned to the IRS or State. The

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amount of additional processing fees will be determined by the efforts required and the complexity of the transaction but will not exceed \$25. Processing fees will be paid by BANK to Processor.

You must notify BANK in writing 3 business days prior to the account being debited to revoke the authorization for applicable fees agreed to in Section 4, and to afford BANK a reasonable opportunity to act on your request. You may notify us in writing at: Sunrise Banks, N.A., c/o Santa Barbara Tax Products Group, LLC, 11085 North Torrey Pines Road, Suite 210, La Jolla, California 92037.

8. **FEDERAL ELECTRONIC FUND TRANSFER ACT DISCLOSURES:** The Federal Electronic Fund Transfer Act provides you with certain rights and obligations regarding the Federal and state income tax refund that will be electronically deposited into your Account established at Sunrise Banks N.A. for that purpose. If you believe that there is an error or if you have a question about your Account, write to Sunrise Banks N.A., **c/o Santa Barbara Tax Products Group, LLC**, 11085 North Torrey Pines Road, Suite 210, La Jolla, California 92037 or telephone (877) 908-7228 and provide Sunrise Banks N.A. with your name, a description or explanation of the error and the dollar amount of the suspected error. Sunrise Banks N.A. will advise you of the results of its investigation within 10 business days.

**Business Days:** Our business days are Monday through Friday, excluding federal holidays. Saturday, Sunday, and federal holidays are not considered business days, even if we are open.

**Confidentiality:** We will disclose information to third parties about your account or the transfers you make:

- To complete transfers as necessary;
- To verify the existence and condition of your account upon the request of a third party, such as a credit bureau or merchant; or
- To comply with government agency or court orders; or
- If you give us your written permission; or
- As explained in the Privacy section of this disclosure

**Our Liability:** If we do not complete a transfer to your account on time or in the correct amount according to our agreement with you, we may be liable for your losses or damages. In addition to all other limitations of our liability set forth in this Agreement, we will not be liable to you if, among other things:

- Circumstances beyond our control (natural disasters, such as fire or flood) prevent the transfer, despite reasonable precautions that we have taken.
- The funds in your account are subject to legal process or other claim restricting such transfer.

9. **Compensation.** In addition to any fees paid directly by you to Intuit, BANK will deliver a portion of the refund processing fee to Intuit in consideration of Intuit's provision of various programming, testing, data processing, transmission, systems maintenance, status reporting and other software, technical and communications services. The balance of the refund processing fee will be paid to the Processor, which will compensate Bank for its banking services.

10. **Governing Law.** The enforcement and interpretation of this Agreement and the transactions contemplated herein shall be governed by the laws of the United States, including the Electronic Signatures in Global and National Commerce Act, and, to the extent state law applies, the substantive law of South Dakota.

11. **Arbitration Provision.** This arbitration provision is made pursuant to a transaction involving interstate commerce and shall be governed by the Federal Arbitration Act. You agree that any and all disputes which in any way arise out of or relate to this Agreement, shall be resolved solely by binding arbitration before the American Arbitration Association ('AAA') before a single arbitrator in arbitration commenced as close as possible to where you reside. Any and all disputes must be brought in the parties' individual capacity, and not as a plaintiff or class member in any purported class or representative proceeding. Judgment on the award rendered by the arbitrator may be entered in any court having jurisdiction thereof. Each party to any such arbitration shall bear its own separate costs and expenses of the arbitration and shall share equally in the charges of the AAA, including the fee of the arbitrator. However, if you are unable to pay any fee of the AAA or the arbitrator, BANK or its Processor agrees to pay those fees for you. By agreeing to arbitration, you, BANK and Processor are waiving our rights to file a lawsuit and proceed in court and to have a jury trial to resolve disputes. The word 'disputes' is given its broadest possible meaning, and includes all claims; disputes or controversies, including without limitation any claim or attempt to set aside this arbitration provision.

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12. USA Patriot Act Disclosure. To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When we open an Deposit Account for you for the purpose of receiving your IRS federal tax refund or if you apply for one of our products, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask for your driver's license information or information from other identifying documents of yours.

**YOUR AGREEMENT**

BANK and Processor agree to all of the terms of this Agreement. By selecting the **'I Agree'** button in TurboTax: (i) You authorize BANK to receive your 2014 federal tax refund from the IRS and to make the deductions from your refund described in the Agreement, (ii) You agree to receive all Communications electronically in accordance with the 'Consent to Conduct Business Electronically' section of the License Agreement for Tax Year 2014 TurboTax(R) Software and Services, as the term 'Communications' is defined therein, (iii) You consent to the release of your 2014 federal tax refund deposit information and application information as described in Section 2 of this Agreement; and (iv) You acknowledge that you have reviewed, and agree to be bound by, the Agreement's terms and conditions. If this is a joint return, selecting **'I Agree'** indicates that both spouses agree to be bound by the terms and conditions of the Agreement.

## Sunrise Banks, N.A. Tax Product Privacy Policy

### **FACTS** What does Sunrise Banks, N.A. do with your Personal Information?

**Why?** Financial Companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.

**What?** The types of personal information that we collect and share depend on the product or service you have with us. This can include:

- Social Security Number and Date of Birth
- Address of Residence
- Government Issued Identification Card

When you are no longer our customer, we continue to share your information as described in this notice.

**How?** All Financial Companies need to share customers' personal information to run their everyday business. In the section below we list the reasons Financial Companies can share their customers' personal information; the reasons Sunrise Banks, N.A. chooses to share and whether you can limit the sharing.

Reasons we can share your personal information	Does Sunrise Banks, N.A. share?	Can you limit this sharing?
For our everyday business purposes — such as to process your transaction, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.	Yes	No
For our marketing purposes — to offer our products and services to you.	Yes	No
For joint marketing with other financial companies.	Yes	No
For our affiliates' everyday business purposes — information about your transactions and experiences.	Yes	No
For our affiliates' everyday business purposes — information about your creditworthiness.	No	We Don't Share
For our affiliates to market to you.	No	We Don't Share
For non affiliates to market to you.	No	We Don't Share

**Questions?** Toll Free: 877-908-7228

Who We Are	
Who is providing this notice?	Sunrise Banks, N.A.
What We Do	
How does Sunrise Banks, N.A. protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. Your information is accessible only to employees who need the information in order to process your product request, answer your questions or determine the types of additional products or services that we think may interest you. We train our employees on their responsibility to maintain the privacy of your personal information.
How does Sunrise Banks, N.A. collect my personal information?	We collect personal information about you when you apply for a tax related product. This includes information in your application and your tax return in each year that you applied for a tax-related bank product, such as your name, address, social security number, income, deductions, refund and the like. We also collect information about your transactions with us such as payment histories, balances due and tax information. We also collect your personal information from others such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only: <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes — information about your creditworthiness,</li> <li>• Affiliates from using your information to market to you,</li> <li>• Sharing for non affiliates to market to you,</li> </ul> State laws and individual companies may give you additional rights to limit sharing
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and non financial companies. <ul style="list-style-type: none"> <li>• <i>Our affiliates include financial companies such as University Financial Corp. dba Sunrise Banks.</i></li> </ul>
Non affiliates	Companies not related by common ownership or control. They can be financial or non financial companies. <p><i>Sunrise Banks, N.A. does not share with nonaffiliates so they can market to you.</i></p>
Joint Marketing	A formal joint marketing agreement between non affiliated financial companies that together market financial products or services to you. <p><i>We may disclose all of the Confidential Information that we collect as described above to companies that perform marketing services on our behalf or to other tax product providers with whom we have joint marketing agreements.</i></p>
Other Important Information	
This Notice is adopted in recognition of our obligations under Title V of Gramm-Leach Bliley Act of 1999.	
This Notice applies only to individuals who have applied for a tax-related bank product.	

## ELECTRONIC POSTMARK - CERTIFICATION OF ELECTRONIC FILING

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**Taxpayer:** Tiffany A Linke

**Primary SSN:** 431-51-5564

**Federal Return Submitted:** January 21, 2015 07:45 AM PST

**Federal Return Acceptance Date:** 01/21/2015

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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, 2015. 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, 2015, your Intuit electronic postmark will indicate April 15, 2015, 6 AM. If your federal tax return is rejected, the IRS still considers it filed on time if the electronic postmark is on or before April 15, 2015, and a corrected return is submitted and accepted before April 20, 2015. If your return is submitted after April 20, 2015, a new time stamp is issued to reflect that your return was submitted after the IRS deadline 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, 2015. If your federal tax return is rejected, the IRS will still consider it filed on time if the electronic postmark is on or before October 15, 2015, and the corrected return is submitted and accepted by October 20, 2015.

### 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.