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U.S.

# Bernie Sanders Tax Return Shows Perils of Do-It-Yourself Tax Prep

Sanders underpaid by \$4,479 in 2009, an accountant says. He promptly fixed any mistakes, his campaign says.



A spokeswoman for Bernie Sanders said in an email that the tax returns of the Vermont senator and his wife, Jane Sanders, are up-to-date. PHOTO: ANDREW HARNIK/ASSOCIATED PRESS

*By Richard Rubin*

May 8, 2019 5:30 a.m. ET

WASHINGTON—The oldest tax return released by Democratic presidential candidate Bernie Sanders offers a lesson in the perils of do-it-yourself tax preparation.

The handwritten document contained four mistakes: three that reduced Mr. Sanders's reported taxes and one that increased them. Had his 2009 returns been prepared correctly, Mr. Sanders should have paid \$4,479 more than he did, according to Illinois accountant Glen Birnbaum, who analyzed the returns at the request of The Wall Street Journal.

“You need software at some point with the multiple calculations,” said Mr. Birnbaum, who, like most accountants, uses such electronic tools. “It’s not easy to do it by hand.”

Sarah Ford, a spokeswoman for Mr. Sanders, said in an email that the tax returns of the Vermont senator and his wife, Jane Sanders, are up-to-date.

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 SANDERS TAX RETURNS
 

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“Any minor inadvertent errors made were identified soon after filing the original tax returns, and promptly addressed,” she wrote.

- [View the 2009 document here.](#)
- [View the 2010 document here.](#)

Ms. Ford didn’t answer additional questions. Mr. Sanders released 10 years of tax returns last month, part of a wave of Democrats showing detailed pictures of their finances. They are presenting a contrast with President Trump: He hasn’t released his returns, breaking a 40-year tradition of disclosure by presidents and major-party candidates, and is now fighting an attempt by House Democrats to obtain them directly from the IRS.

At times, those Democratic disclosures have yielded unwanted attention, including ex-Rep. Beto O’Rourke’s mistaken deduction for medical expenses and three years when Sen. Kamala Harris claimed zero charitable deductions.

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“I welcome the scrutiny, the questions, the opportunity to respond to them,” Mr. O’Rourke said last month, according to the Washington Post. “I think that should be part of anyone’s candidacy for the highest, most important office in the country.”

On the 2009 return, Mr. Sanders reported \$314,712 in adjusted gross income and \$55,345 in total taxes. He didn’t limit his personal exemptions as required then for high-income households. He also didn’t apply the alternative minimum tax, the parallel levy that limits some tax breaks.

Mr. Sanders also claimed a \$3,000 deduction for employee expenses, perhaps the \$3,000 break then available to members of Congress. But that and other miscellaneous deductions could only be claimed if they exceeded 2% of adjusted gross income, which they didn’t for him.

In the opposite direction, Mr. Sanders included all of the couple’s Social Security benefits in income, even though only 85% are taxable.

Mr. Sanders had paid more than enough through withholding and estimated taxes to cover even the larger amount on the recalculated tax return, so he wouldn’t have had to write an additional check to the government. It isn’t known whether the IRS reduced the amount of his overpayment upon receiving the return. However, on his 2009 return, Mr. Sanders asked the IRS to apply his \$8,058 overpayment to his 2010 taxes, and that full amount shows up on his 2010 return.

Unlike the 2009 filing, the couple's 2010 return was created by a paid tax preparer using software.

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*Do you still fill out taxes by hand? If so, why? Have you ever had tax software make a mistake on your returns? Join the conversation below.*

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