

TRUST & ESTATE ADMINISTRATION

709 Gift Tax Return Module

Generate federal gift tax returns with the 709 Gift Tax Return module of ONESOURCE Trust & Estate Administration. It handles net gifts, calculation of the generation-skipping tax on direct skips, importing of information from the donor's prior year return, split gifts with spouses including a link to the spouse's 709, Crummey trust gifts, and much more. New features include Annual Exclusion Report and interest and penalty calculation. As with all ONESOURCE Trust & Estate Administration products, the 709 module is fully integrated with the entire suite or can be used as a standalone product.

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Form 709	United States C	Gift (and Generation-Skippir (For gifts made during calendaryear 3 ► See separate instructions.	2007)	оме № 1545-0020 20 07
1 Donor's first na	me and middle initial	2 Donor's last name	3 Donor's social security	number
Mary		Doe	222-33-	-4444
	IP code r died during the year, ch nded the time to file this l	PA 18974- eck here ►] and enter date of de Form 709, check here ►] ted on Schedule A. Count each persc		ions)
E 11a Have you (the donor) previously filed a Form 709 (or 709-A) for any other year? If "No," skip line 11b			'No," skip line 11b	x
11b If the answ	ertoline 11 a is "Yes," h	as your address changed since you la	st filed Form 709 (or 709-A)?	x
by you and instructions	by your spouse to third pa) (If the answer is "Yes," the	Do you consent to have the gifts (inclu rties during the calendar year considered of following information must be furnished plines 13-18 and go to Schedule A.)	as made one-half by each of you? (S	See ent
13 Name of c	onsenting spouse John		14 SSN 111-22-3456	
15 Were you	married to one another d	uring the entire calendar year? (see in	structions)	x
	" check whether n	narried divorced or widowed/deceased	d, and give date (see instructions)	

CONTACT US TODAY

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709 MODULE

- Generates federal gift tax returns
- Includes annual exclusion report and interest and penalty calculation
- All calculations are done as you work

