Bloomberg Tax

ESTATE & GIFT TAX™ 709 PREPARER

QUICK START GUIDE

February 2020

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INSTALLING THE PROGRAM

This is the Quick Start Guide for **709 Preparer from Bloomberg Tax & Accounting** version 2019.1.

IMPORTANT! If you have a previous version of **709 Preparer** already installed, see **Before Installing Updates**, below. Otherwise, proceed to **Installation** on page 6.

The following are supported:

- Installation via Remote Desktop
- Installation to a local drive, a mapped network drive, or a UNC path such as \\server\share

BEFORE INSTALLING UPDATES

Caution! We recommend that you do **not** uninstall previous versions of the program before installing version 2019.1. Uninstalling earlier tax year program versions would make them unavailable to you.

- **Tax Year Updates** — When you are installing a version of the program that includes an updated Form 709, specify a different installation folder from the previous program installation folder when prompted for the Destination Folder (step 5, page 9). Otherwise, the new files will replace the program files from the previous version and the older program version will be inaccessible.
- **Non-Tax Year Updates** — When you are installing an interim maintenance release (e.g., a program patch or update that does not include an updated 709 form), specify the same installation folder as the previous program installation folder when prompted for the Destination Folder.

  Note. For Network installations, running the workstation setup at each licensed workstation is required for Tax Year Updates, unless otherwise noted in the transmittal letter accompanying the program. Do **not** uninstall the program from the workstation before reinstallation. The program will recognize the Workstation ID previously set up at licensed workstations and will allow you to continue using that ID or specify a new one during the setup process.
- **Client Returns** — The installation process will not damage or overwrite client return files on your hard disk or on the network that were created with earlier versions of the program.

  The new version of the program will convert and recalculate data from client return files created using an earlier tax year program version. The program gives these files a preliminary file name that has a mid-extension to distinguish them from the files created with earlier program versions. For example, if you have a file named

JohnSample.709, the new program version would create a copy with a new file name of JohnSample.2019.709.

INSTALLATION

Please close all programs before **709 Preparer**.

SYSTEM REQUIREMENTS

- Windows 7, Windows 8, Windows 8.1, and Windows 10
- 2 GB RAM
- 4 GB free hard disk space

709 Preparer is available for download from our **Electronic Fulfillment Center**. Before installing, you need to determine if you are installing to a single machine or to a network.

SINGLE-USER INSTALLATION

These procedures should be performed by the network system administrator, supervisor, or other person who is familiar with the network operating system and who can create directories and assign access rights on the network. Installing and running the program after installation requires full administrative rights to the installation folder specified in step 5, below.

The installation process consists of two parts: (1) downloading the program from the Electronic Fulfillment Center and (2) installing the 709 Preparer program.

For network installation instructions, see **Network Installation** on page 10.

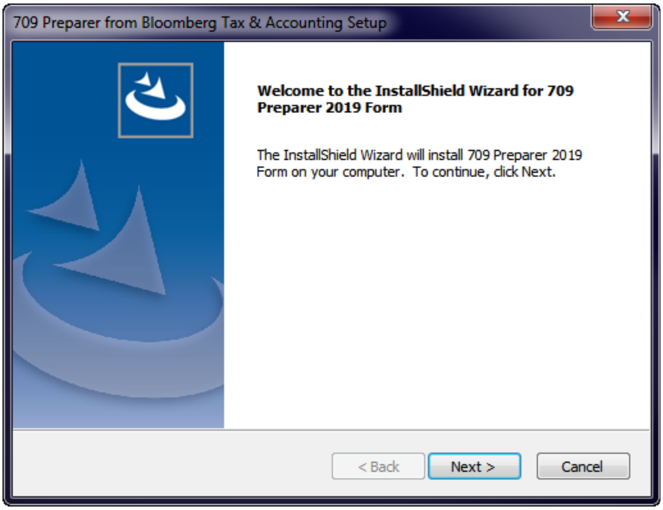
DOWNLOAD FROM ELECTRONIC FULFILLMENT CENTER

1. Before you begin this process, please add **Product_Delivery@bnasoftware.com** to your email safe senders list so that you will be able to receive the download link email.
2. You will be required to enter your **Customer ID** and **Access Code**. This information was sent through a letter and/or email to the main contact on the customer account.
3. Open your browser to **advantage.bloombergtaxtech.com** and click on **Electronic Fulfillment** in the top right corner.
4. Enter your **Customer ID** and **Access Code** and click **Next**.
5. Verify or make changes to the main contact to receive product information and updates. You will have the choice to send the email with the link to download the software to the main contact or a different person.

6. Check email for an email sent from **Product_Delivery@bnasoftware.com** with a link to download the software. In this email, click on the link to access the software download page.
7. On the software download page, click on the **Download** button to begin the download.

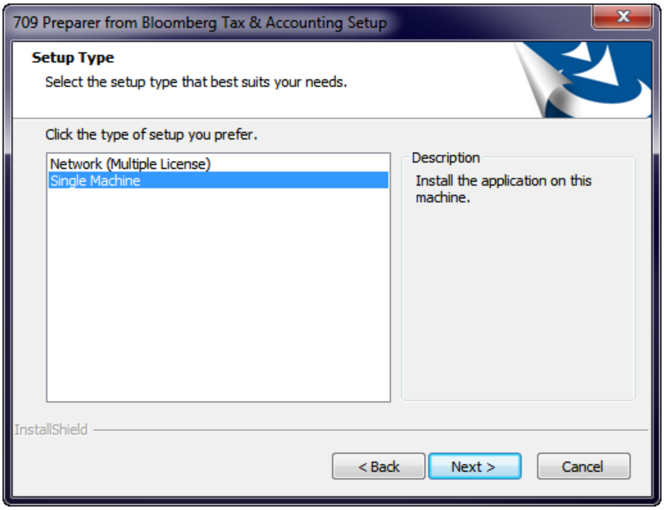
INSTALL 709 PREPARER PROGRAM

1. When the software download from the Electronic Fulfillment Center is complete, you will need to **run** or **open** the downloaded program setup file **(.exe)** file to begin the installation of the software on the workstation.
2. The **Welcome** panel opens.



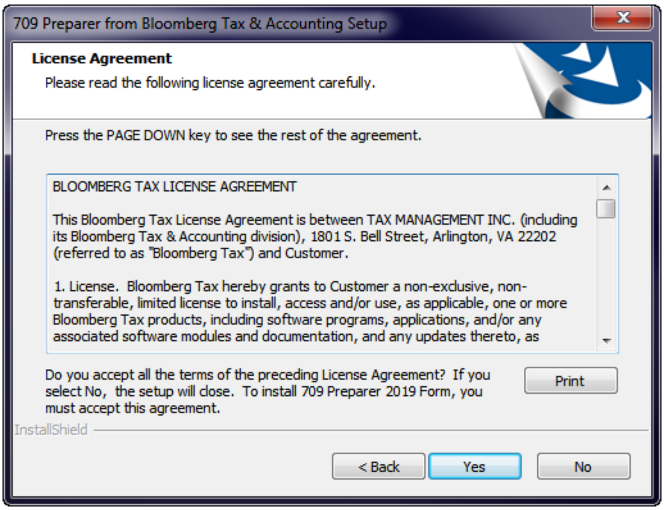
Click **Next** to continue.

3. The **Setup Type** panel opens.



Click **Next** to accept the default selection of **Single Machine**.

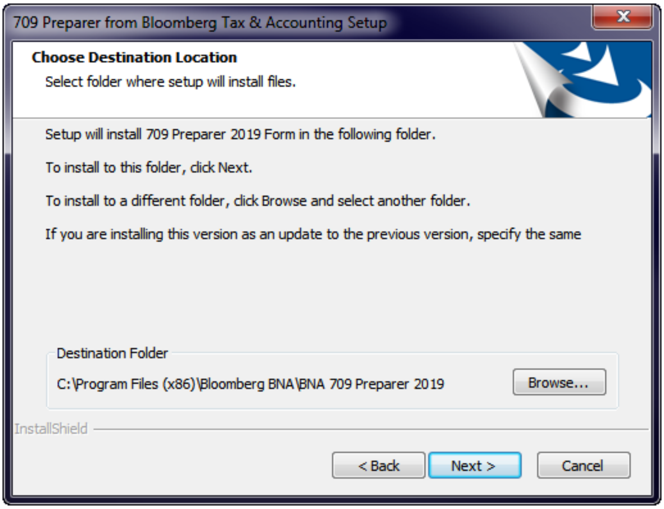
4. The **License Agreement** panel opens.



Read through the License Agreement, and click **Yes** to accept the terms and continue with the Setup. If you do not accept the terms of the, the program will not be installed.

Note. You may review the License Agreement any time after installation; click **Help** > **Contents** > **Technical Support** > **Bloomberg Tax Technology License Agreement**.

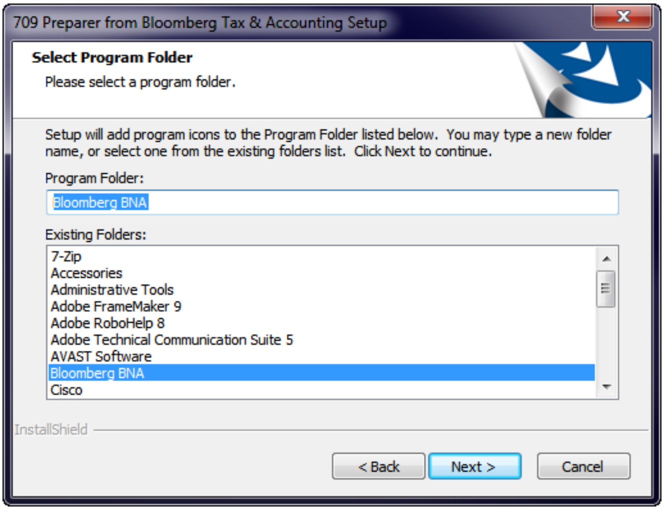
5. The **Choose Destination Location** panel opens.



This program version (2019.1) prepares an updated Form 709 for tax year 2019. We recommend you do **not** install to the same folder to which previous program versions were installed as doing so would prevent you from preparing returns for prior tax years.

- To accept the default path of **C:\Program Files (x86)\Bloomberg BNA\BNA 709 Preparer 2019**, click **Next**.
- To choose a different location:
  - Click **Browse**.
  - Use the **Choose Folder** dialog to select a drive and folder. (You may create a new folder if you want.)
  - Click **OK** to return to the **Choose Destination Location** panel.
  - Click **Next**.

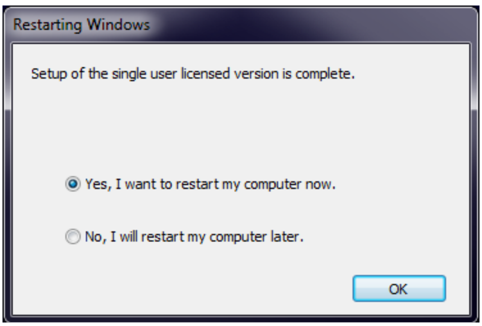
6. The **Select Program Folder** panel opens.



This panel allows you to select the folder that holds program icons.

Click **Next** to accept the default program folder (recommended) or, to choose a different program folder, select a folder from the list or enter a new folder name in the **Program Folder** field, then click **Next**.

7. A status bar shows the progress of the installation. When the process is complete, the **Restarting Windows** message opens.



Click **Yes, I want to restart my computer now** (recommended) and click **OK**, or click **OK** to restart your computer later.

The installation is complete. A **709 Preparer 2019** shortcut has been added to the **Bloomberg BNA** folder of the Windows Start menu, and a shortcut icon has been added to your Windows desktop.

NETWORK INSTALLATION

You may install the program on a single network server and set up the program on multiple workstations, up to the number of purchased licenses. A license is used for each user account activated on each workstation. For licensing questions or to purchase additional licenses, call **Bloomberg Tax & Accounting Software Product Sales** at **800.424.2938**.

For standalone installation instructions, see **Single-User Installation** on page 6.

Setting up **709 Preparer** for use in a network environment is essentially a three-step process:

- Step 1 **Downloading Application from the Electronic Fulfillment Center**
- Step 2 **Setting Up The Server**
- Step 3 **Setting Up Workstations**

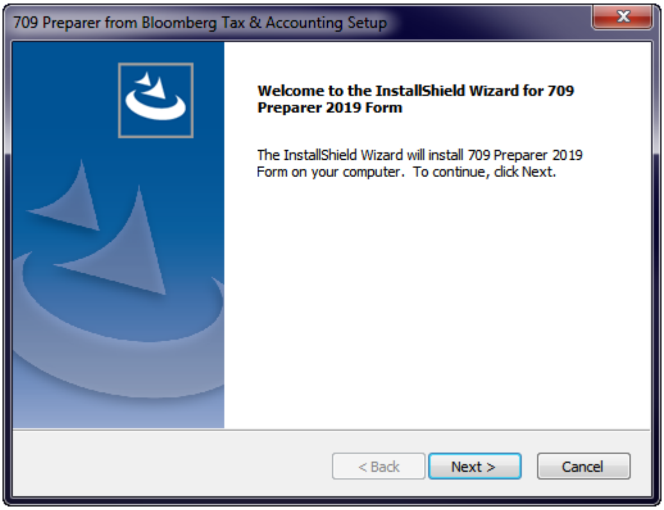
DOWNLOAD FROM ELECTRONIC FULFILLMENT CENTER

1. Before you begin this process, please add **Product_Delivery@bnasoftware.com** to your email safe senders list so that you will be able to receive the download link email.
2. You will be required to enter your **Customer ID** and Access Code. This information was sent through a letter and/or email to the main contact on the customer account.
3. Open your browser to **advantage.bloombergtaxtech.com** and click on **Electronic Fulfillment** in the top right corner.
4. Enter your **Customer ID** and **Access Code** and click **Next**.
5. Verify or make changes to the main contact to receive product information and updates. You will have the choice to send the email with the link to download the software to the main contact or a different person.
6. Check email for an email sent from **Product_Delivery@bnasoftware.com** with a link to download the software. In this email, click on the link to access the software download page.
7. On the software download page, click on the **Download** button to begin the download.

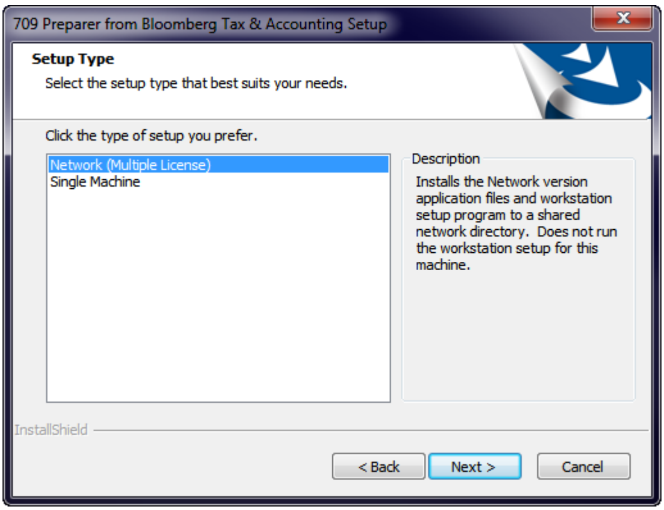
SETTING UP THE SERVER

During installation, the server component of **709 Preparer** and the workstation setup program are installed to the folder you specify in step 5, below.

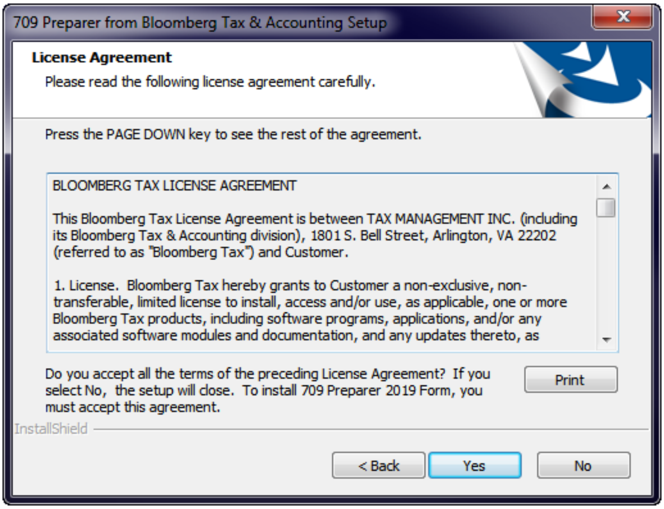
1. **Run** or **Open** the downloaded program setup file (**.exe**) file to begin the installation of the software on the network server.
2. The **Welcome** panel opens. We suggest that you exit all Windows programs before continuing. After you have read the **Welcome** panel, click **Next** to continue.



3. The **Setup Type** panel opens, displaying your installation choices: Network (Multiple License) or Single Machine. Select Network (Multiple License). Then click **Next.**



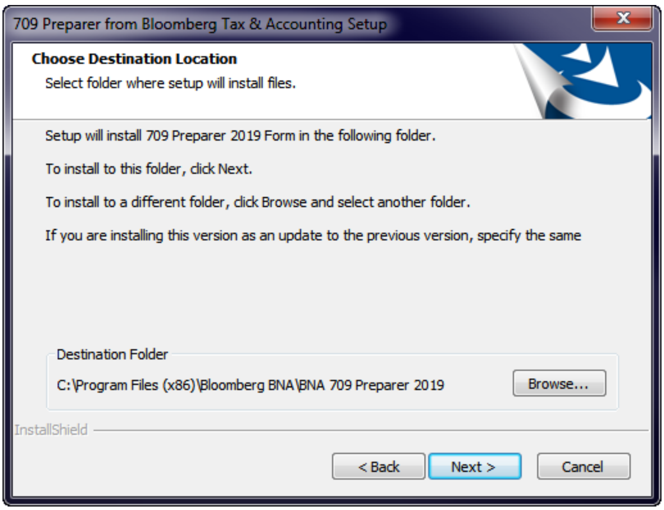
4. The **License Agreement** panel opens.



Read through the License Agreement, and click **Yes** to accept the terms and continue with the Setup. If you do not accept the terms of the Bloomberg Tax & Accounting License Agreement, the program will not be installed.

Note. You may review the License Agreement any time after installation; click **Help** > **Contents** > **Customer Support** > **Bloomberg Tax Technology License Agreement**.

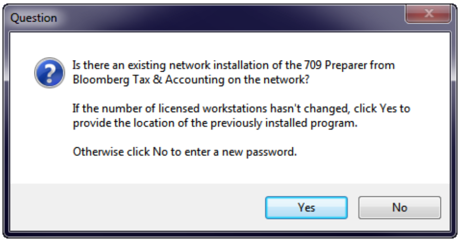
5. The **Choose Destination Location** panel opens.



This program version (2019.1) prepares an updated Form 709 for tax year 2019. We recommend you do **not** install to the same folder to which previous program versions were installed as doing so would prevent you from preparing returns for prior tax years.

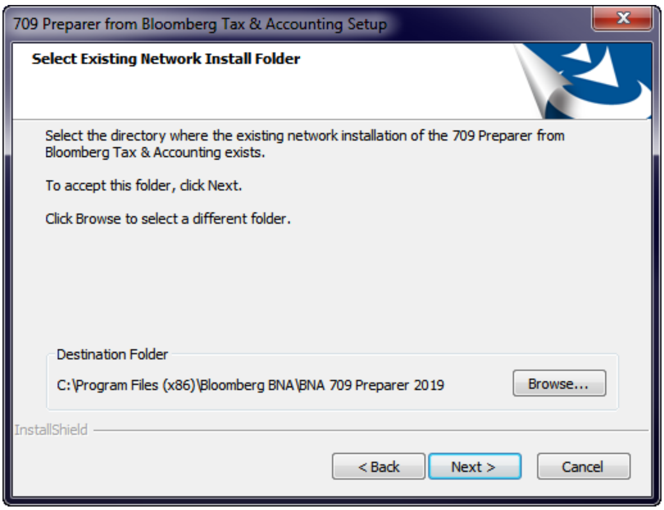
- To accept the default path of **C:\Program Files(x86)\Bloomberg BNA\BNA 709 Preparer 2019**, click **Next**.
- To choose a different location:
  - Click **Browse**.
  - Use the **Choose Folder** dialog to select a drive and folder. (You may create a new folder if you want.)
  - Click **OK** to return to the **Choose Destination Location** panel.
  - Click **Next**.

6. If the Setup program detects no previous versions of the program on the server, the following dialog opens:



- If there is no existing network installation of the program on the server or if the number of licensed workstations has changed, click **No** and go to step 8, below.
- If there is an existing network installation of the program on the server and if the number of licensed workstations has not changed, click **Yes** and continue to the next step.

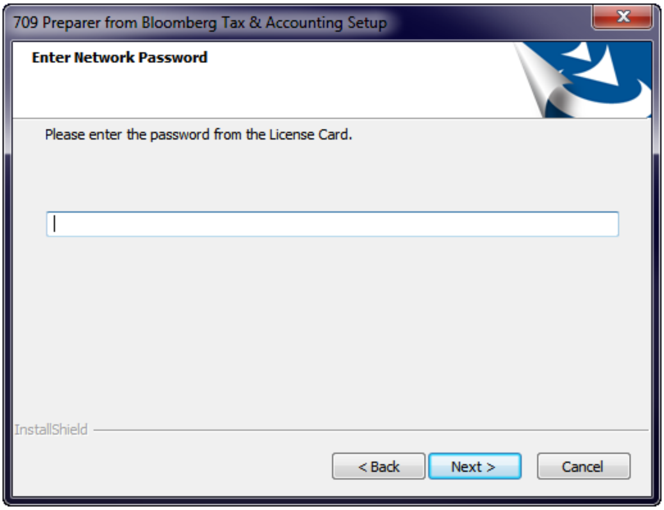
7. The **Select Existing Network Install Folder** panel opens.



Use this panel to select the location of the previous program version, then click **Next**.

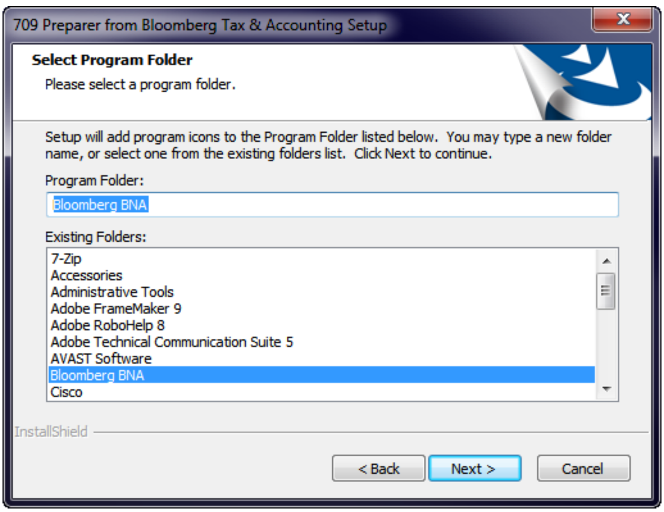
Note. Specifying the folder where the previous version resides is useful when reinstalling, or when installing program updates. The Setup program will use the previous version's password.

8. The **Enter Network Password** panel opens.



Enter the network password that corresponds to the number of purchased licenses, then click **Next**. If you are in need of a network password, please contact **Bloomberg Tax & Accounting Customer Support** at **800.424.2938**.

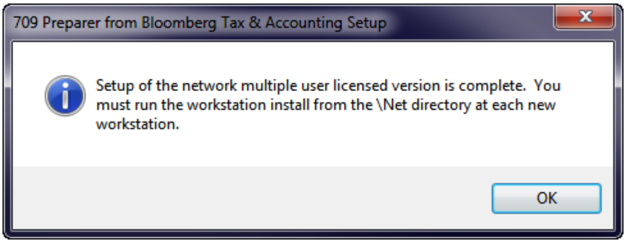
9. The **Select Program Folder** panel opens.



This panel allows you to select the folder that holds program icons.

Click **Next** to accept the default program folder (recommended) or, to choose a different program folder, select a folder from the list or enter a new folder name in the **Program Folder** field, then click **Next**.

10. A status bar shows the progress of the installation. When the process is complete, the following message opens:



11. Click **OK**. The Setup utility closes.

Note. You can find the number of workstation licenses allowed by your License Agreement in the separate **709 Preparer 2019 Network License Administrator** utility. This utility is installed automatically on the server only. To open it, click **Start** > **Programs** > **Bloomberg BNA** > **BNA 709 Preparer 2019 Network License Administrator**. You can also use the utility to change the number of licensed workstations and manage workstation IDs.

SETTING UP WORKSTATIONS

Before installing the program on network workstations, you must install the server component on your network file server. See **Setting Up The Server** on page 11.

To install or run the program on a network workstation, you must have full rights to the installation folder on the server and to the following folder on the workstation:

C:\Users\[user name]\AppData\Local\Bloomberg BNA\BNA 709 Preparer.

Caution! To avoid unnecessary complications, ensure that no workstations are running the program until you have finished the setup of all workstations.

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1. Go to each workstation that you want to set up as an authorized licensed workstation. To begin, on the Windows Start menu, select **Run** and, in the text box, type:

   F:\Program Files (x86)\Bloomberg BNA\BNA 709 Preparer 2019\Net\setup\setup.exe

   (where **F:\Program Files (x86)\Bloomberg BNA\BNA 709 Preparer 2019** is the network path specified in step 5, page 13),

   and click **OK**.

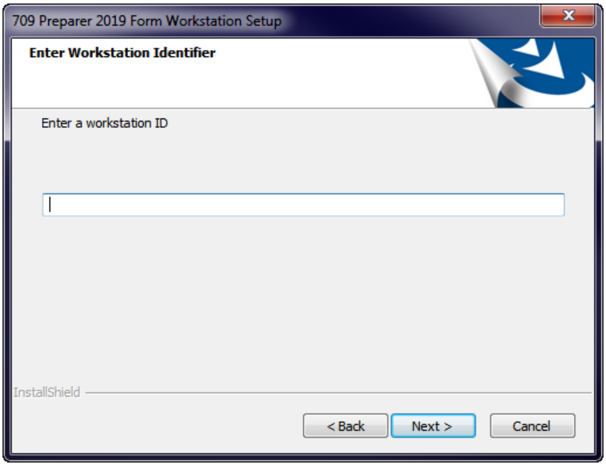
2. The first panel (**Welcome** panel) of the Setup wizard opens. Click **Next**.

3. The **License Agreement** panel opens. To accept it and continue with the workstation setup, click **Yes**.

4. The **Select Program Folder** panel opens, allowing you to select the folder that holds program icons.

   Click **Next** to accept the default program folder (recommended) or, to choose a different program folder, select a folder from the list or enter a new folder name in the **Program Folder** field, then click **Next**.

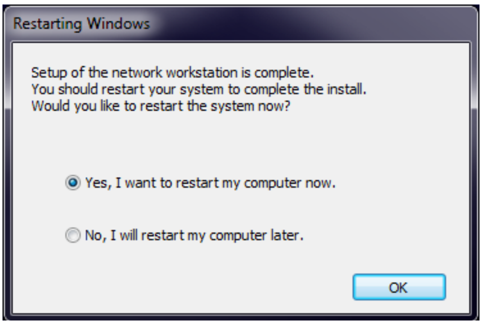
5. The **Enter Workstation Identifier** panel opens.



   Enter a workstation ID of your choice for this licensed workstation, and click **Next**. The workstation ID **must** be unique — the program will not allow more than one workstation to use the same workstation ID. Spaces are allowed.

   Note. After starting the program, the Workstation ID displayed in the **Preferences** dialog, on the **Network** tab.

6. A status bar shows the progress of the installation. When the process is complete, the **Restarting Windows** message opens.



   Click **Yes, I want to restart my computer now** (recommended) and click **OK**, or click **OK** to restart your computer later.

The installation for the workstation is complete. A **709 Preparer 2019** shortcut has been added to the **Bloomberg BNA** folder of the Windows Start menu, and a shortcut icon has been added to your Windows desktop.

7. To allow users to install regular program updates, grant full permissions to the local program folder.
8. Repeat the above steps at each authorized licensed workstation. (If the server is to be used as a licensed workstation, you must run the workstation setup on the server as well.)

After starting the program, if you select the **Enable Web Update** and **Check for update at startup** options on the **Preferences** dialog, then each time you start the program, it will automatically determine if any program updates are available. If any updates are detected, you will be prompted to apply the update(s).

Note. When a return is opened, the program "locks" the file so that no one else can open it. If a second network user tries to open a locked file, the program issues a message that identifies the workstation ID of the PC that has the return open.

MANAGING WORKSTATION IDS AND LICENSES

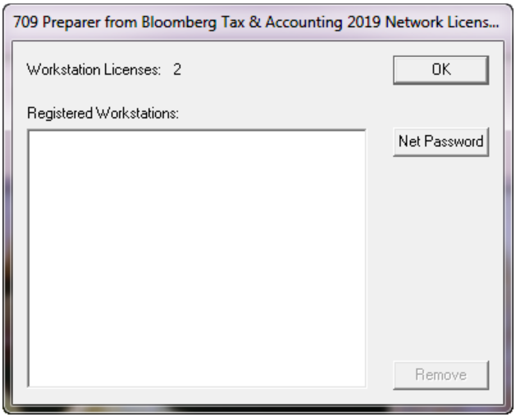
The **709 Preparer 2019 Network License Administrator** utility, installed automatically on the server during program installation, allows you to:

- review the existing workstation IDs (Workstation IDs are added only during workstation installations.)
- remove workstation IDs
- change the number of authorized workstation licenses (requires new network password). To obtain a new network password for a different number of licensed workstations, please call Customer Support at 800.424.2938, Monday–Friday, 9:00 a.m. to 7:00 p.m. (ET).

To run the utility:

1. On the server, click **Start** > **Programs** > **Bloomberg BNA** > **BNA 709 Preparer 2019 Network License Administrator**. (The utility has its own shortcut icon that is available only on the server where the program was installed.)

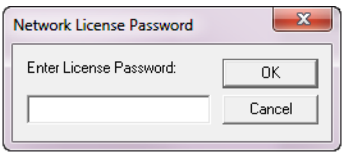
The **Network License Administrator** dialog opens.



Notice the number of workstation licenses available and list of registered workstations. These are the **workstation IDs**.

Note. While the utility is in use, no client workstations can run **709 Preparer**.

2. To add a new workstation ID, run the workstation setup (see **Setting Up Workstations** on page 16).
3. To remove a workstation ID from the list of registered workstations, select it in the list, then click **Remove**.
4. To change the number of licensed workstations:
   a. Call Bloomberg Tax & Accounting Sales at 800.424.2938, to modify the number of purchased licenses and to obtain a new network password.
   b. Click the **Net Password** button. The **Network License Password** dialog opens.

   c. Enter the new password, and click **OK**. A message displays telling you how many workstations are now allowed.
5. Click **OK** to close the utility.

Note. The workstation ID for a particular machine is also displayed on the **Network** tab of the **Preferences** dialog. (Click **Options** > **Preferences** > **Network** tab.)

CHANGING THE DATA FOLDER DEFAULT

To change the default data folder:

1. Click **Options** > **Preferences**. The **General** tab of the **Preferences** dialog is displayed.
2. In the **Default Data Folder** field, enter the new path (drive and folder) or click the browse button (...) to locate and select the desired path.
3. Click **OK**.

SETTING UP THE PREPARER DATABASE

The Preparer Database is a database of people to be designated as the Preparer of tax returns. Setting up a Preparer Database can save you time when preparing tax returns. **709 Preparer** uses the database to automatically populate the preparer-related fields in the return. This is especially beneficial in larger firms where there are many preparers.To set up the Preparer Database, you simply need to add preparers to it.

Note. In network environments, as users make changes to the Preparer Database, all users have immediate access to the updated database. For Single Machine installations, the Preparer Database is saved on the local drive by default.

If you also use **706 Preparer**, you may use the same Preparer Database for both **706 Preparer** and **709 Preparer**. To do this, specify the same Default Data Folder in both programs (click **Options** > **Preferences** > **General** tab).

You may also use the Preparer Database from a previous version of **709 Preparer**. Simply copy the **practitioners.inf** file from the prior version's **\DefFiles** subfolder to the new version's **\DefFiles** subfolder.

To set up a new preparer database:

1. Start **709 Preparer**.
2. On the **Options** menu, select **Preparer Database**, then select **Edit**. The **Edit Preparer Information Database** dialog opens.
3. Click **New** at the bottom of the dialog, then enter the information for the preparer. Repeat this step for each preparer.
4. After adding all preparers to the database, click **OK**.

If the preparer used in the currently open return does not exist in the Preparer Database, the program prompts you to add the preparer to the database when you open the **Edit Preparer Information Database** dialog.

UNINSTALLING THE PROGRAM

Uninstalling **709 Preparer** removes all files created during installation, but all return files and preparer databases are retained.

To uninstall **709 Preparer**:

1. Click **Start** > **Control Panel**.

2. On the Control Panel, double-click **Programs and Features**.
3. Select **709 Preparer 2019 Form** and click **Uninstall**.

   Note. To uninstall the program from network workstations, select **709 Preparer Workstation**. Uninstalling the program from a workstation does **not** remove the workstation ID from the network license database. See **Managing Workstation IDs and Licenses** on page 18.)

4. To guard against an accidental uninstall, the program prompts for confirmation. Click **Yes** to continue.

The program deletes all files created during program installation, including the program shortcut icons. All empty folders pertaining to **709 Preparer** are removed as well.

The Uninstall program will **not** delete any files created or modified **after** the initial program installation. This includes any return (***.709**) files – even those in the 709 Preparer folder – and certain program configuration files (such as **BNA709Preparer.gid**), as well as any program shortcuts that were manually created, renamed, or moved.

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GETTING TO KNOW THE PROGRAM

709 Preparer simplifies and automates the process of preparing gift tax returns.

The program calculates all federal taxes on gifts made by U.S. residents during the tax year. The program also supports split gifts, allowing you to synchronize the gifts between the taxpayer's and spouse's 709 returns.

The program allows you to complete forms and save them in a return so that you can retrieve and change them as needed. The program's Help provides filing requirements and other general information about each form. PDFs of IRS instructions and line-specific instructions are available in the Help system. Press F1 anywhere in the program to get context-sensitive help.

USER SERVICES

If you have questions about using **709 Preparer**, please call **Bloomberg Tax & Accounting Customer Support** at 800.424.2938, or send an email message to **bnas_support@bna.com**. Customer Support is available Monday–Friday, 9:00 a.m. to 7:00 p.m. (ET).

For solutions to common problems, see **Frequently Asked Questions** on page 43.

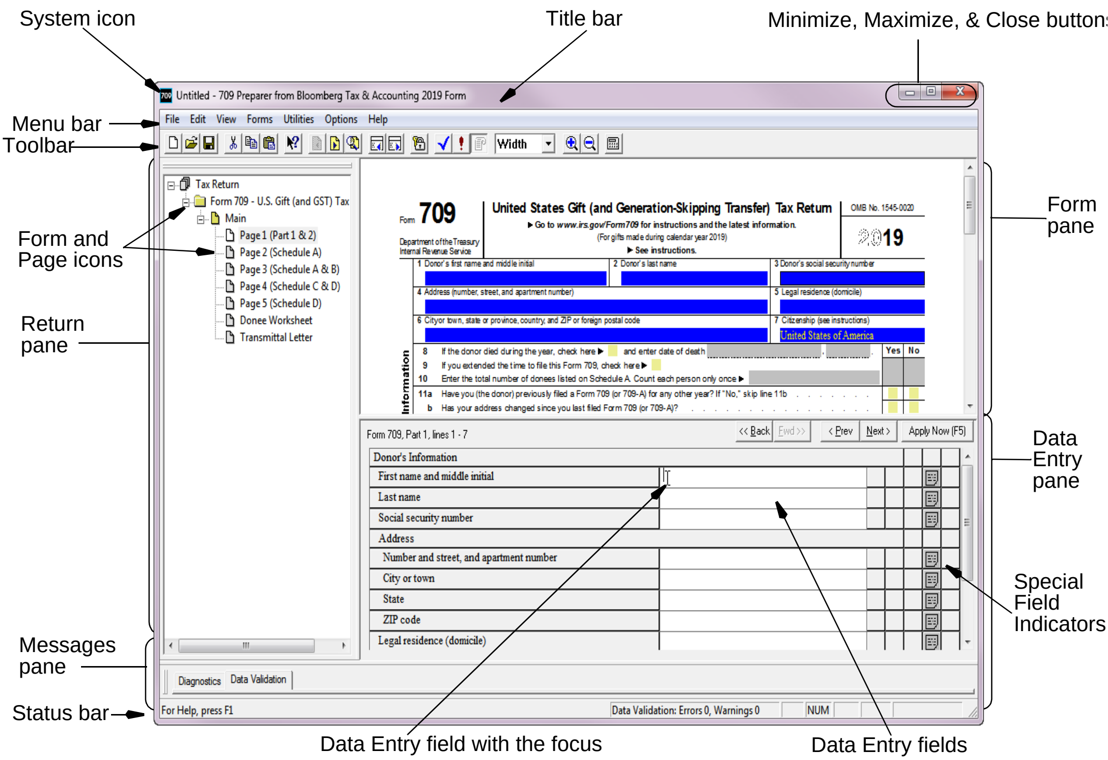
We continue to update our website with revised FAQs, program updates, and other program information. Please visit our website at **pro.bloombergtax.com/software-resources**.

With your subscription, you receive prompt notification of program updates or enhancements. Use the **Check for Update** feature, available on the program's Help menu, to download the latest program updates.

We invite you to send us comments on the program and guide. Please submit your comments via the Product Support Contact Form at **pro.bloombergtax.com/software-resources.**

PROGRAM WINDOW

This section identifies and describes elements of the **709 Preparer** window.



RETURN PANE

The **Return** pane on the left side lists all forms and schedules (as well as attachments) added to the open 709 return-clicking a form in the list displays it for review in the Form pane and for data entry in the Data Entry pane.

FORM PANE

The **Form** pane contains the form selected in the Return pane. When you create a new return, Form 709, Page 1, automatically opens in the Form pane.

You can click the fields to open the corresponding Data Entry pane that is used to enter data for that field, and place the cursor in the Data Entry field that applies to that form field. You cannot make entries directly in the Form pane.

The colors of the fields indicate the type of field, whether a direct input field, calculated field, or the selected field. The Data Entry pane contains the input fields for the selected field(s). To change the field colors, from the **Options** menu, select **Preferences**.

When you resize the Form pane, the image resizes automatically if the Zoom is set to **Width**.

DATA ENTRY PANE

The **Data Entry** pane is located immediately beneath the Form pane and is used to enter and edit data into fields that are, in turn, reflected in the corresponding area of the Form pane.

You can bring focus to a particular form field of the Data Entry pane by double-clicking the form's page in the Return pane and then either clicking in the appropriate field of the form shown in the Form pane or clicking the **Next Data Entry Pane** button until the Data Entry field is reached. Similarly, you can move around in the Data Entry pane by clicking on the field or by pressing either the **Tab** and **Shift**+**Tab** keys or the **Down Arrow** and **Up Arrow** keys to reach a particular Data Entry field.

The **Forward** button and **Back** button enable you to retrace your steps, by positioning the cursor in the Form pane/Data Entry pane in which the cursor had been focused. This can save you time navigating from one pane to another. The **Forward** button reverses a **Back** button press. For instance, if you discover that you had pressed the **Back** button too many times (beyond the point to which you wanted to return), you can press the **Forward** button enough times to reach that particular point.

To see the results of your entries updated in the Form pane immediately, click the **Apply Now** button or press **F5**. (Press **F9** to recalculate the return.)

MESSAGES PANE

The **Messages** pane lists any diagnostics and data validation messages for the return when you select **Run Diagnostics** from the **Utilities** menu. The Messages pane is displayed when the program is opened. To hide the Messages pane (e.g., to facilitate data entry), from the View menu, deselect **Messages Pane**.

As you enter data, the Message pane's **Data Validation tab** interactively displays messages concerning required or missing entries. We suggest that you display this tab as you make entries for a return.

SYSTEM ICON

The **System Icon** is located in the upper-left corner of a window's title bar. If you click the system icon, a pop-up menu opens, offering basic options such as Size, Move, Maximize, Close, etc.

TITLE BAR

The **Title bar**, located across the top of a window and to the right of the system icon, displays the name of the file and the program.

MENU BAR

The **Menu bar** lists the names of the program's available menus from which you can select commands, options, and forms.

TOOLBAR

The **Toolbar** consists of a row of buttons that can be used to quickly invoke basic program commands, such as **New**, **Open**, **Save**, **Next Page**, etc. Each button contains a ToolTip indicating the button's function. See **Overview of Toolbar Buttons**, below.

STATUS BAR

The **Status bar** is a horizontal bar at the bottom of the program window. It consists of a program status message area at the left and some shadow boxes at the right. The program status message area displays program operation messages such as “initializing,” “running diagnostics,” etc. When you highlight a menu or submenu item, a brief Help line describing that item will appear in this area of the status bar.

SPECIAL FIELD INDICATORS

The **Special Field Indicators**, located to the right of the data entry fields, are buttons that provide access to specialized handling for most fields. See **Special Field Indicators** on page 27.

OVERVIEW OF TOOLBAR BUTTONS

The **Toolbar** command on the **View** menu displays or hides the Toolbar (displayed by default). It contains buttons that you can click to quickly perform a program command or procedure, such as create a new return or open an existing return. Each button contains a title indicating the button’s function. The Toolbar contains the following buttons:

New – starts a new return

Open – opens an existing return

Save – Saves your entries and selections in the return and lets you name a new return.

Cut – Removes the selected data and places it on the Clipboard. Using a combination of the Cut and Paste commands, you can cut the contents of the selected field from the current location and paste it to another location within the same form, to a different form, or to another Windows program.

Copy – Places the selected data on the Clipboard.

Using a combination of the Copy and Paste commands, you can copy the contents of the selected field to another location within the same form, to a different form, or to another Windows program.

Paste – Places the data in the Clipboard at the insertion point.

Using a combination of the Cut or Copy, and Paste commands, you can paste the Clipboard’s contents to another location within the same form, to a different form, or to another Windows program.

Help – Allows you to access Help on Spot to get help by clicking the area in question.

Previous Page – Opens the previous page within the Form pane.

Next Page – Opens the next page within the Form pane.

Return Editor – Displays the Return Editor dialog to allow you to add, remove, or open a form to the current return.

Previous Data Entry Pane – Opens the previous Data Entry pane. This button is also found at the top of the Data Entry pane.

Next Data Entry Pane – Opens the next Data Entry pane. This button is also found at the top of the Data Entry pane.

Show/Hide Calculated Fields – Shows or hides the calculated fields in the Data Entry pane (where applicable). When displayed, the calculated fields are displayed with a background of gray, by default. **Unhide/Show must** be selected to override a calculated field.

Run Diagnostics – In the Messages pane, updates and displays the diagnostic messages currently issued for the open return.

Show Data Validation Messages – Brings focus to the data validation messages (if any) under the Data Validation tab in the Messages pane.

Show/Hide Messages Pane – Shows or hides the Messages pane at the bottom of the 709 Preparer window.

Width **Zoom Settings** – Allows you to quickly select a pre-defined zoom setting.

Zoom In – Magnifies the image in the Form pane.

Zoom Out – Decreases the image in the Form pane.

Recalc All – Reloads each form in memory and recalculates the amounts in each field to ensure that calculations are updated.

SPECIAL FIELD INDICATORS

Expand Entry – Located in the Data Entry pane to the right of some fields. Click to enter text in the Expand Entry (description) dialog. The text will print on multiple lines or, in the case of the Donee ID data entry field, to open a dialog where you can enter information about a Donee or select a Donee from a list.

Lock/Unlock Calculated Field – Locks or unlocks a calculated field in the Data Entry pane (where applicable). When unlocked, allows you to make an entry and override the program-calculated entry (if you relock the field, the program replaces your entry with the original program-calculated entry). **The Show Calculated Fields button (see above) must be selected to override a calculated field.**

Caution! If you re-lock the field, the program replaces your entry with the original program-calculated entry.

List (Inactive/Active) – Located in the Data Entry pane to the right of any editable amount field. Allows you to enter descriptions and dollar amounts in the List dialog to provide an “adding machine tape” list to any amount field. In its’ disabled state (top button), the button is disabled and will not allow the List dialog to open. When the button is enabled (center button), the field is editable but does not contain data. The bottom button depicts the state of the button when you have entered data into the List.

Note (Inactive/Active) – Located in the Data Entry pane to the right of any entry field. Allows you to enter special footnotes in the Note dialog for a field. The top button is enabled but it does not contain data. The bottom button depicts the state of the button when it is enabled and you have entered data into the Note.

Drill Down (Inactive/Active) – Located in the Data Entry pane to the right of any calculated entry field. Allows you to link (jump) to the source field containing the value that was carried to this field. The top button is disabled only if you unlock the field. By default, the button is enabled (see bottom button).

PROGRAM OVERVIEW

709 Preparer simplifies and automates the process of preparing gift tax returns.

As you complete a tax return, on-the-spot Help provides program-specific instructions) for every line of Form 709 (and several other IRS forms), as well as for every field of each Data Entry pane.

The program calculates all federal taxes on gifts made by U.S. residents during 2018.

The program also supports split gifts, allowing you to synchronize the gifts between the taxpayer's and spouse's 709 returns.

The program allows you to complete forms and save them in a return so that you can retrieve and change them as needed. The program's comprehensive Help system provides filing requirements and other general information about each form, IRS instructions (when provided), and program-specific instructions for each form line.

SPECIAL TERMS

Return – Consists of the forms, schedules, attachments that together represent the facts of a donor's Gift Tax return. A return in **709 Preparer** uses the extension **.709**. The program includes two sample returns.

Return Set – Consists of the IRS forms and schedules that comprise a Gift Tax return, plus any additional Bloomberg Tax & Accounting-designed reports included in the defined return set, such as the Donee Worksheet and Transmittal letter. The program includes three predefined return sets (IRS, Client, and Preparer). You can add or delete return sets, or change the reports and forms included in the set used to predefine the items included in (or excluded from) a return printed for the intended recipient.

FORMS

Below is a complete listing of the IRS forms that are prepared by the program.

The list includes specially-designed "custom" attachments and a report that has been created by Bloomberg Tax & Accounting for the 709 Preparer program to display the results of program diagnostics, etc. The structure and operation of these forms cannot be modified.

IRS FORMS AND SCHEDULES

Form 709	United States Gift (and Generation-Skipping Transfer) Tax Return
Schedule A	Computation of Taxable Gifts (including Transfers in Trust)
Schedule B	Gifts from Prior Periods
Schedule C	Portability of Deceased Spousal Unused Exclusion (DSUE) Amount and Restored Exclusion
Schedule D	Computation of Generation-Skipping Transfer Tax
Continuation Schedule	Completed automatically during the Print or Print Preview process for additional detail lines of information in cases where there is insufficient room on the form
Schedule B, Column C Worksheet	Worksheet that computes Column C on Schedule B
Form 56	Notice Concerning Fiduciary Relationship
Form 2350	Program for Extension of Time to File U.S. Income Tax Return
Form 2848	Power of Attorney and Declaration of Representative
Form 4868	Program for Automatic Extension of Time to File U.S. Individual Income Tax Return
Form 712	Life Insurance Statement
Form 8275	Disclosure Statement
Form 8275-R	Regulation Disclosure Statement
Form 8821	Tax Information Authorization
Form 8822	Change of Address
Form 8892	Program for Extension of Time To File Form 709 and/or Payment of Gift/GST Tax

SPECIALLY DESIGNED ATTACHMENTS

Custom Attachment(s)	Blank forms attached to specific pages in the return where you can make disclosures, elections, or calculations, etc.
Comments	Allows you to add “sticky-note” style attachments to any page displayed in the Form pane.
Transmittal Letter	Provides a customizable form letter that the preparer can give to a client to provide general information on his/her return.
Lists	Allows you to add “adding machine tape” style detail to support any Data Entry amount field. See “Special Field Indicators” on page 27 for further information.
Notes	Allows you to add a note that acts as a footnote to any Data Entry field. See “Special Field Indicators” on page 27 for further information.

SPECIALLY DESIGNED REPORT(S)

Diagnostic Messages	Displays the diagnostic messages (if any) issued for a return.
Notes Report	Displays the notes you entered in Data Entry fields.
Lists Report	Displays the lists you entered to support Data Entry *amount* fields.

Allocation of Annual Exclusions Report	Displays (in donee name sequence) the annual exclusion amount allocated to each gift. The report shows an asterisk ("*") next to those gifts whose annual exclusion amount is not the same as the amount allocated by the program.
Donee Worksheet	Displays a list of the Donees who received gifts, providing the following for each donee: name, address, relationship to the donor, annual exclusion, and gift amount.

PROGRAM CALCULATIONS

- Automatically calculates current and prior year gift taxes.
- **Support for Split Gifts** — When you indicate that the donor has elected to split gifts, the program automatically:
  - Treats all gifts on Schedule A not given to the spouse as split gifts. For those donors who were married for only part of the tax year, the program checks the date the gift was given before treating it as a split gift.
  - Posts gift information from Schedule A, Parts 1, 2, and 3, to Schedule A, Part 4
  - Posts split gifts that are direct skips entered on Schedule A, Part 2, to Schedule D, Part 1, and automatically enters the split gift value in Schedule D, Part 1, column B.
  - Provides for direct entry or import of split gifts from the spouse's 709 return.
- **Support for the Marital Deduction** — When you link a gift to the donee designated as the spouse who is a U.S. citizen (on the Donee Worksheet), the program checks that the gift was given during the marriage and was not of terminable interest, then it automatically:
  - Marks the gift as one that qualifies for the marital deduction.
  - Posts the information for the gifts that qualify for the marital deduction on Schedule A, Part 4, line 4.
  - Enters the total annual exclusion for these gifts on Schedule A, Part 4, line 5 if spouse is a U.S. citizen.
- **Support for the Charitable Deduction** — When you indicate that a gift on Schedule A, Part 1, is a charitable deduction, the program automatically posts the appropriate gift information to Schedule A, Part 4, line 7, and calculates the total charitable deduction less exclusions.
- **Support for Special QTIP (Section 2652(a)(3))** — When you indicate that a gift on Schedule A, Part 1, qualifies for special QTIP under section 2652(a)(3), the program automatically posts the appropriate information to Schedule D, Part 2.
- **Support for the Election Out of QTIP Treatment of Annuities (Section 2532(f)(6))** — You can indicate that a gift on Schedule A, Part 1, is included in the election out of QTIP treatment. The program automatically posts the appropriate information to Schedule A, Part 4, line 12.

- **Support for Annual Exclusion** — The program tracks the annual exclusion allocated to each gift:
  - Automatically allocates the annual exclusion to each gift by the donee mapped to the gift.
  - Provides a more automatic calculation of values elsewhere in the return, such as Schedule A, Part 4, line 2.
  - Provides the Donee Worksheet as a report to help you track the annual exclusion allocated to each donee.
  - Issues a diagnostic message warning when the maximum annual exclusion for the donee has been exceeded.
- **Support for Donees** — The Donee Worksheet allows you to quickly enter all information about each donee in one place for easy retrieval and use on Schedule A.
  - You only have to enter the information about each donee once and the donee information will be available for the donor's return in future tax years.
  - You can indicate whether a donee is the spouse, enter the donee name and address, specify the donee's SSN or EIN.
  - Allows the program to more accurately allocate the annual exclusions to each gift.
  - Allows import of donee information from spouse's return.

Note. To use the Donee Worksheet, use the Expand Entry button next to the Donee ID field when entering a gift on Schedule A.

- **Support for Generation-Skipping Transfers** — To support the GST Tax calculation, the program:
  - Posts information from Schedule A, Part 2 to Schedule D, Part 1, and keeps the gifts synchronized.
  - Posts the annual exclusion for the Schedule A Part 2 gift, as the nontaxable portion of transfer of the associated item in Schedule D, Part 1.
  - Supports trusts with Crummey Powers by allowing you to indicate whether a gift qualifies as a nontaxable gift for GST purposes.
  - Allows entry of the GST exemption allocated to the gift to be made in the gift's Data Entry pane, and then carries it to the associated row of Schedule D, Part 3.
  - Posts the GST Exemption Allocated information from Schedule A, Part 3, to Schedule D Part 2 line 5.
  - Automatically updates Schedule D, Part 3, so that it is synchronized with both sections of Schedule D, Part 1, without losing any entered data.

- Provides an entry field on Schedule B for GST exemption used in each prior year return to support the calculation of Schedule D, Part 2, line 2 (Total GST Exemption Used in Prior Periods).

PROGRAM FEATURES

- Automates preparation of IRS Form 709 and other related forms.
- Performs most computations automatically.
- Carries schedule totals automatically to Form 709, Page 1.
- Program will open prior tax returns created in previous versions of the 709 Preparer and convert the data in those returns to the current version's file format.
- Import Split Gifts feature allows you to enter split gifts only once on Schedule A of the taxpayer and spouse returns and to keep the gifts synchronized with each other's Schedule A.
- Displays all official IRS forms as they actually appear.
- Attractive user interface, incorporating state-of-the-art visual controls including zoom, print preview, and resizable window panes.
- Easily move a gift entered in the wrong Part of Schedule A to other parts (only Parts 1, 2, and 3 are involved) — no retyping needed.
- On-the-spot Help provides IRS or custom instruction for each line. In addition, the comprehensive Help system is completely indexed for easy access to topics with hypertext jumps to related topics.
- Diagnostic messages immediately alert you to missing or erroneous data. Hyper-links take the focus directly to the problem's most likely source when you double-click the message.
- Overwrite option allows you to adjust calculated values; automatically highlights overridden fields with a special color.
- Auto Backup feature automatically saves current return data in a temporary file, thus providing protection against data loss in the event of system failure.
- Return Editor and Return Pane allow you to add, open, and remove specific forms within a return, and quickly navigate to all tax return form and schedule pages.
- Quick navigation to all tax return pages.
- Return template feature allows you to create, define, and save the forms and preparer settings in a return as a template that you can use as a basis for the new returns.
- Flexible formatting for detailed "grid" schedules allows you to:
  - Add, append, delete, and sort rows.

- Suppress item number feature prevents a number from printing for a row allowing for headings or more detailed descriptions.
- Specify adjustable space between rows.
- Print a horizontal line between rows.
- Split long descriptions between pages.

- Comments let you add printable “sticky note”-style attachments to refer to other attachments or make other notations elsewhere on a page. You can tell the program to print any Comment always, never, or with selected Return Set(s).
- Program provides extensive support for bringing information that rarely changes over from prior year returns that were created in the 709 Preparer. You can use this information as a starting point for the current year’s return. Bringing in gift data from Schedule A is optional for Parts 1, 2, and 3, and prior year gift amounts are stored in handy reference fields.

SMART DATA ENTRY

- Smart Data Entry feature lets you enter the information for each gift and donee just once — gifts are posted to other schedules, as appropriate. You only need to enter a number identifying the donee to post the donee’s information on Schedule A.
- Data Entry panes guide you through the entries needed to prepare the return.
- Instantly processes and posts entries to all appropriate places in the return, and bypasses inapplicable fields as you enter return data.
- Donee Worksheet allows you to quickly enter all information about each donee in one place. Then you can easily retrieve and apply the donee information for each gift reported on Schedule A — just pick the donee from the provided list. The donee information will be available for easy retrieval for the next year’s return.
- Reduced data entry allows you to:
    - Enter preparer information once for all client files.
    - Enter split gifts in just the taxpayer or spouse return.
- Preparer Database allows you to set up information — or different combinations of information — for each preparer in your firm, and then specify which preparer’s information you want applied to any return. For more information, see **Setting Up the Preparer Database** on page 20.

SPECIAL REPORTS

- Donee Worksheet acts as both an entry mechanism for information about all donees, as well as a report for each donee’s total gifts and annual exclusion amounts.

- Provides blank supplemental schedules (custom attachments) where you can make disclosures, elections, or calculations. You can attach these schedules to any page of an IRS form.
- See also **Specially Designed Report(s)** on page 29.

PRINT FLEXIBILITY

- Print preview lets you review current or selected forms, entire return, or selected reports on-screen before printing.
- Flexible printing selection — print the entire return, selected forms, or only specified pages of multi-page forms.
- Timesaving Return Sets feature allows you to set up and save combinations of IRS forms that are tailored to different recipients. Three standard Return Sets are provided: IRS, Preparer, and Client.
- Font selection for printing return data provides for greater flexibility in tailoring the program output to your needs.
- All printed forms meet IRS specifications for filing.
- Ability to preview and print blank copies of the IRS forms.
- Allows you to print zeros on the form as desired.
- Detailed “grid” schedule options: horizontal line between items, extra space between items, split long descriptions into separate rows.
- Flexible print selection for each Comment — you can tell the program to print any Comment always, never, or with selected Return Set(s).
- Gives you control over which Comments you want to print.

OTHER PROGRAM FEATURES

- Continuation schedules are automatically generated when you print for items that do not fit on the form. Subtotals are automatically posted back to the schedule.
- Allows dollars and cents entry.
- Check Spelling feature lets you verify or correct the spelling in any data entry field — you can even customize the spell checker dictionary.
- Toolbar allows easy access to common tasks, including starting new returns, and return navigation.
- Updates feature enables you to automatically check-for and download any maintenance updates released by Bloomberg Tax & Accounting.
- Font options allow you to customize the appearance entries on the form for gift data and for the labels and entries in the Data Entry panes.

- Cut, Copy, and Paste features allow you to transfer information to this and other Windows programs.
- History feature allows you review when a return was saved (and, for Network users, by whom).
- Color options provide a wide range of colors for on-screen text and field backgrounds.
- Zoom options let you change the display magnification of forms.
- Automatically checks for interim releases on the Internet.

PROGRAM HELP AND SUPPORTING DOCUMENTS

PROGRAM HELP

Context-sensitive help for all menu commands, toolbar commands, and operation procedures. Press F1 anywhere in the program to get context-sensitive help.

Extensive built-in help system includes answers to frequently asked questions (FAQs).

TAX HELP

PDFs of Official IRS instructions are included for each form, to the extent that such instructions have been issued.

Full online text of IRS Publications 448 (Federal Estate and Gift Taxes), 561 (Determining the Value of Donated Property), and 950 (Introduction to Estate and Gift Taxes), included.

Program Help includes list of required attachments to help ensure form acceptance by the IRS.

CUSTOM HELP

Short explanations and/or instructions for each line in each form, as needed, to supplement IRS instructions.

DYNAMIC HELP

A click on the toolbar turns the cursor into a question mark that can then be positioned on any active area of the form to instantly produce help for that item.

MESSAGES PANE HELP

Error messages on the Diagnostics tab report inconsistent data entry. If you double-click a message, the program will take you to the field that caused the message.

Messages on the Data Validation tab report inconsistent data entry and assist with the return preparation process.

IRS DOCUMENTS

Official IRS Publications available on the Help menu in Adobe® Acrobat® (PDF) format include Pub. 561 (Determining the Value of Donated Property) and Pub. 950 (Introduction to Estate and Gift Taxes).

Official IRS Instructions available on the Help menu in PDF format for all IRS forms prepared within the program.

ONLINE DOCUMENTATION

Includes a clearly-written Quick Start Guide with helpful answers to FAQs.

PROGRAM FILES

Note. The Setup program also writes files to the following folders:

\My Documents\BNA 709 Preparer 2018\Samples — Contains sample files. Note that copies of the sample files are also written to the program folder you specify in this step. For users of Windows 7 and later, we recommend not making changes to the files in the specified program folder as doing so will result in the creation of virtual copies of the files.

\My Documents\BNA 709 Preparer 2018\Templates — Any templates later created by the user will be stored in this folder.

- The following files and folders are in **C:\Documents** and **C:\ProgramData\BNA** 709 Preparer 2018, and will be visible by all users:
- **709TransLtr.dat** — Created on program start up. Contains data for the Transmittal Letter.
- **ReturnSets.rdl** — User's Custom return sets. (This file doesn't appear until you add a custom return set.)
- **Practitioners.inf** — Preparer databases. You may decide to change the path to an existing .inf file. However, for Windows 7 and greater users, if the path you choose is within **Program Files**, adding preparers will generate errors. This file doesn't appear until you add a practitioner to the database.
- Backups — This folder contains copies of your saved forms.

The default data directory for each user is **My Documents\BNA 709 Preparer 2018**. Since each user on a single machine has their own **My Documents**, each user will have their own data folder. Each user may elect to change their default data directory, but doing so will affect the current user only, since each user sets their own folder. However, for Windows 7 and greater users, selecting a location within the Program Files folder will result in virtual return files being created. That is, the files will appear as though they are in Program Files, but will actually be in the user's AppData folder.

In addition, the installation routine creates these subfolders:

- **Samples** — contains the sample 709 return files. The 709 Preparer program includes two sample returns to illustrate the features available within the program. These files are installed in the default data folder.
- **DefFiles** — contains the form and definition files for the program.
- **IRS PDFs** — contains the IRS publications and IRS form instructions in portable document format (PDF). The files are accessed from the 709 Preparer's Help menu.
- **Net** — **<<Network Installations Only >>** contains the files needed to run the setup program at each licensed workstation.
- **Program** — contains the program executable, dynamic link library files, help system files, as well as the 709 Preparer Installation Guide (in portable document format (PDF).
- **Templates** — contains the return template shipped with the program. (All templates that you later create will be stored in this folder.)

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IMPORTING SPOUSE'S SPLIT GIFTS

OVERVIEW

When gift splitting is elected, both spouses must file a return, and each filer must include on their return certain data from the other filer's return. (In the program, you indicate that the donor is splitting gifts by selecting "Yes" on Form 709, Page 1, Part 1, line 12.)

When you indicate that the donor has elected to split gifts, the program automatically:

- Treats all gifts on Schedule A that were not given to the spouse as split gifts (for those donors who married during the tax year, the program checks the date the gift was given before treating it as a split gift).
- Posts gift information from Schedule A, Parts 1, 2, and 3 to the "Gifts made by spouse" grids in the same part of Schedule A.
- Posts split gifts that are direct skips entered on Schedule A, Part 2 to Schedule D, Part 1 and then carries them to Schedule D, Part 3.
- Automatically allocates the annual exclusion to the spouse's split gifts.
- Allows GST Exemption amounts to be entered for the spouse's split gifts on both Schedule A, Part 2 and Part 3.

As an alternative to entering the spouse's data directly into the taxpayer's return, the Import Spouse's Split Gifts command on the Utilities menu automatically imports select data from the spouse's designated return to the open return.

From the spouse's return, the program will:

- Import the spouse's full name and social security number from Form 709, Page 1, Part 1, lines 1, 2, and 3 to Form 709, Page 1, Part 1, lines 13 and 14.
- Imports all split gifts from the spouse's return and enters them on the "Gifts made by spouse" area in the corresponding part of Schedule A on the open return.

Note. To bring the split gifts from the taxpayer's return to the spouse's return, open the spouse's return and use the **Import Spouse's Split Gifts** command on the Utilities menu. Or, answer Yes when prompted to Import Split Gifts on opening the spouse's return.

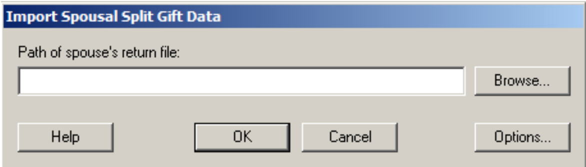
IMPORTING SPOUSE'S SPLIT GIFTS DATA

The accuracy of the data imported through this procedure can be assured only if the spousal split gift data is kept up-to-date on both the taxpayer's and spouse's return.

To accomplish this, you must maintain a separate return for the spouse in the same version of the 709 Preparer. In addition, gift splitting must be elected on both returns. That is, on both returns, "Yes" must have been selected on Form 709, Page 1, Part 1, line 12.

To import the split gifts from the spouse's return into the open return:

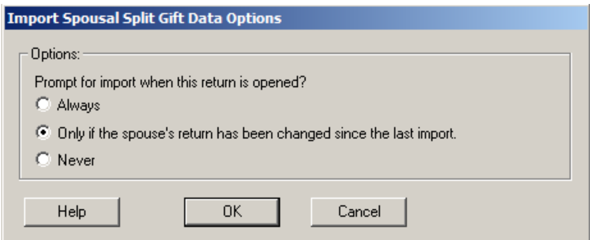
1. From the Utilities menu, select **Import Spouse's Split Gifts**. The **Import Spousal Split Gift Data** dialog opens.



2. Click **Browse** to display the **Open** dialog. Select the spouse's return and click **Open**. The focus returns to the **Import Spousal Split Gift Data** dialog, showing the spouse's return in the **Path of spouse's return file:** box.

   The program stores the path and name of the spouse's return in the open return when you save it. The next time the dialog is displayed for this return, the information will be displayed.

3. If you want to check or change the conditions under which you are prompted to re-import spousal split gift data, on the **Import Spousal Split Gift Data** dialog, click **Options**. The Import Spousal Split Gift Data Options dialog opens.



4. The Import Spousal Split Gift Data Options dialog enables you to indicate whether or when you want the program to automatically remind you to import split gifts from the spouse's return the next time you open the taxpayer's return.

   On the **Import Spousal Split Gift Data Options** dialog, select one of the following options:

   - **Always** — The program prompts you each time you open the taxpayer's return (recommended choice).
   - **Only if the spouse's return file has been changed since the last import** (default selection).
   - **Never** — The program never prompts you.

   Note. If you select **Never** and click **OK**, you can still select one of the other two options later by selecting **Import Spouse's Split Gifts** on the **Utilities menu** then repeat steps 3 and 4, above.

5. After selecting an option, click **OK** to close the dialog and return the focus to the **Import Spousal Split Gift Data** dialog.

6. Click **OK** to import the spouse's data into the taxpayer's return.
7. Click **Save** on the toolbar. The settings and imported data are not retained until you save the return.
8. The import is one-way — only the split gifts in the open return are updated. To update spousal split gifts reported on the spouse's return, you must open the spouse's return and repeat the process described above.

UPDATING SPOUSAL SPLIT GIFT DATA

If your selection on the **Import Spousal Split Gift Data Options** dialog is **Always** or **Only if the spouse's return has been changed since the last import**, the next time you open the taxpayer's return (see step 4, above) or open the return after the spouse's return has changed, the program will present a message asking if you want to import split gifts from the spouse's return.

1. When prompted, click **Yes** to import split gifts from the spouse's return. The **Import Spousal Split Gift Data** dialog opens. (If you click **No**, the return you selected opens but the spouse's data is **not** updated. The previously imported spousal split gift data is unchanged.)

   By default, the program shows the last return identified as this taxpayer's spouse's return in the **Path of spouse's return file** field.
2. If the return displayed is not the correct return (for instance, the file had been moved), click **Browse** (see step 2, above).
3. Click **OK** to re-import and update the spouse's data into the open return.

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FREQUENTLY ASKED QUESTIONS

This section covers some possible problems and what to do when the unexpected happens. The issues are grouped by the following subject areas:

GIFT ENTRIES

How do I enter gifts on Schedule A?

The program uses Data Entry panes to make it fast and easy to enter gift data and to ensure that all required information is included on the return. The donee and gift information you enter is automatically carried to the corresponding part on the form.

1. Open Schedule A by double-clicking Page 2 (Schedule A) in the Return pane at the left. In the Form pane, click on **Item number 1** in Schedule A, Part 1. Part 2, or Part 3.
2. In the **Donee ID** field, click the **Expand Entry** button (see **Special Field Indicators** on page 27).

   If you have not previously entered any donee information in the Donee Worksheet, the program opens the Enter Donee Information dialog.

   If you previously entered donee information in the Donee Worksheet, the Select Donee dialog opens. If the donee receiving this gift is not on the list, click **New**. The Enter Donee Information dialog opens. Enter the requested donee information. The information for the selected Donee will appear on the form and be added to the Donee worksheet.

   If you previously entered donee information in the Donee Worksheet for the donee receiving the gift, highlight the donee in the list, then click **OK**. The information for the selected Donee will appear on the form.

3. Enter the following information about the Donee's Gift:
    - Gift description.
    - CUSIP number (if the gift was of securities).
    - Donor's adjusted basis of gift.
    - Value at date of gift.

    Note: The Donee information from the Donee Worksheet, the Gift description, and the CUSIP number, if any, are used to create a description that prints on the form.
4. Select all that apply to the Donee's gift in the Classification section. Depending upon your answers elsewhere on the return, some of the fields in this section may be automatically checked, if certain conditions apply as outlined below:
    - Treat this item as a split gift will automatically be selected if all of the following apply:
        - The donor elected gift splitting on Form 709, Part 1, line 12.
        - The spouse is a U.S. citizen.
        - This is not a gift to the spouse.
        - The gift was made during the time of the marriage.
        - The donor did not give the spouse a general power of appointment over this gift.
    - Gift to spouse will be checked automatically if the donee receiving this gift is specified as the donor's spouse on the Donee worksheet.
    - Include in marital deduction will be checked automatically if all of the following apply:
        - The gift is to the spouse.
        - The gift was given during the time of marriage.
        - The gift is not a gift of terminable interest.

How do I change the Nontaxable Portion of Transfer amounts that are carried from Schedule A, Part 2, to Schedule D?

The nontaxable portion of the transfer on Schedule D, Part 1, defaults to the amount in the Annual Exclusion Data Entry field.

If the gift does not qualify as a non-taxable gift for GST purposes, then check the box in the data entry pane for the gift and click "Apply Now". You will see that the field labeled "Non-taxable portion of transfer" has become zero. It will also be zero in Column C for the associated row in Schedule D, Part 1.

How do I enter the GST Exemption allocated for each gift on Schedule D?

Just enter the GST Exemption in the field labeled "**GST Exemption allocated**" in the Data Entry pane of the gift in Schedule A, Part 2, and the program will automatically carry it to the associated row on Schedule D, Part 3.

How do I enter split gifts?

1. On Form 709, Page 1, Part 1, click line 12 in the Form pane, then click Yes in the Data Entry pane. Note that the spouse must be a U.S. citizen for the program to treat any gifts as split gifts.
2. Enter gifts on Schedule A, Part 1, 2, or 3, as appropriate. The program treats a gift entered on Schedule A as a split gift if:
   - The gift was not made to the spouse.
   - The gift was made during the time of the marriage.
   - The donor did not give the spouse a general power of appointment over this gift.

Note that the program will automatically load the split gifts entered on the spouse's return using the "Import Spouse's Split Gifts" operation.

How do I set up import split gifts from the spouse's return into the open return?

To import split gifts from Schedule A, Part 2, of a spouse's return, you must maintain a separate return for the spouse in the same version of the 709 Preparer and gift splitting must be elected on both returns (Form 709, Page 1, Part 1, line 12).

To import the split gifts from the spouse's return into the open return:

1. From the **Utilities** menu, select **Import Spouse's Split Gifts**. The **Import Spousal Split Gift Data** dialog opens.
2. Click **Browse** to display the Open dialog. Select the spouse's return and click **Open**.
3. Click **OK** to import the spouse's data into the taxpayer's return.
4. Click **Save** on the toolbar.

   Note. The import is one-way — only the split gifts in the open return are updated. To update spousal split gifts reported on the spouse's return, you must open the spouse's return and repeat the process described above.

PROGRAM WINDOW

For an illustration of parts of the program window, see **Program Window** on page 24.

How do I get to the next page of a form?

You can get to the next page of a form as follows:

- In the Return pane, double-click the item for the page that you want to view.

  or
- On the toolbar, click the **Next Page** button .

  or
- From the Forms menu, click **Next Page**.

  or
- In the Form pane or the Data Entry pane, press **Ctrl**+**Down Arrow**.

How do I change the size of the Form pane or Data Entry pane?

Use the mouse to hover the pointer over the border of the particular window pane until it changes to a split indicator or double-arrow pointer. Then, click on the border and drag to resize the window.

How do I hide the Messages pane or Return Pane window panes?

From the **View menu**, select **Messages Pane** or **Return Pane** to toggle between show and hide. The Messages Pane can also be shown or hidden by clicking the **Show** or **hide messages pane** button.

Remember, these window panes can also be resized as described above.

DATA ENTRY AND EDITING

I have a lot of information to provide in the description fields of the schedules and it is hard making these long descriptions in the small data entry fields. Can I have more space to make my entries?

Yes, you can. When a data entry field has the **Expand Entry** button , you can click this button to open a dialog that provides additional space for long descriptions.

How do I find the data entry field for a specific field on the Form pane?

In the Return pane, double-click the icon for the form page, then click the particular field on the Form pane. The associated Data Entry pane will be displayed with the focus on the associated Data Entry field.

How do I clear both the Yes and No answers for a question?

In the Data Entry pane, click the **check box that contains the checkmark** once. Note that the box is now **gray.** Press **Delete**.

How do I show calculated fields in the Data Entry pane?

To show (or hide) calculated fields in the Data Entry:

- From the **Options menu**, select **Show Calculated**.

  or

- On the toolbar, click the **Show/Hide Calculated Fields** button .

How do I override a calculated field?

1. Click the **Show/Hide Calculated Fields** button to show the calculated fields in the **Data Entry pane.** Then, click the calculated field you want to override.
2. Double-click the **Locked** button to the right of the calculated field to unlock the field to editing. The button changes to the **Unlocked button** .
3. Enter the new value into the field, then click the **Apply Now button** at the top of the Data Entry pane.

Caution! Do not click the **Unlocked button** unless you want to restore the calculated value.

How do I restore the calculated amount to a field I overwrote previously?

1. With calculated fields showing in the Data Entry pane, click the calculated field in the Data Entry pane whose value you want to restore.
2. Double-click the **Unlocked button** to the right of the calculated field to lock the field and restore the calculated value. Note that the button changes to its locked state .

I overwrote a calculated amount and now the number I entered isn't being used in that field anymore. What happened?

The program restores the calculated amount to an overwritten field when you return to the field and double-click the **Unlocked button** **.** The button changes to its locked state and the calculated value is restored.

I entered a date and would now like to delete that date. How can I do this?

In the Date field of the **Data Entry pane**, click the **date** to highlight the day, month, or year, then press **Delete**.

Why can't I enter numbers in a field using the number keypad?

Check to make sure that **Num Lock** is on.

GRIDS

How do I keep an item number from being displayed or printed on Schedule A?

In the Form pane, click the row whose item number you want to omit. In the Data Entry pane, select **Suppress item number**.

How do I change the order of items already entered on a schedule?

With the focus on any row of the schedule involved, from the **Edit menu**, select **Grid Rows**, then select **Sort**. On the Grid Rows Arranger dialog, select the row you want to move, then click **Up** or **Down** until the row is properly positioned. Click **OK**. When applicable, the program automatically renumbers the rows to reflect the new sort order.

I have a large number of items on my schedule. How can I jump to an item in the middle of the schedule?

1. Right-click one of the items on the schedule in the Form pane.
2. From the shortcut menu, select **Go to Row**. A dialog opens that lists the items on the schedule.
3. Highlight the item you want to move to, then click **OK**.

Can the program print lines separating items on the schedule?

Yes.

1. From the **Options menu**, select **Preferences**.
2. On the **Grids tab** of the **Preferences dialog**, select **Show Horizontal Grid Lines.**
3. Click **OK**.

How do I enter a new row on a schedule?

To add a new row, with the focus on any row of the schedule involved:

- From the **Edit menu**, select **Grid Rows**, then select either **Insert** (to add a row before the row with the focus) or **Append** (to add a row after the last row on the schedule).

  or

- In the **Data Entry pane**, click the **Next Data Entry Pane button** from the last row, or press **Tab** from the last Data Entry field of the last row.

How do I add space between the rows of information on the grids?

1. Click **Options** on the toolbar.

2. Select **Preferences**. The **Preferences dialog** opens.
3. On the **Grids tab**, make sure **Add Space** is selected, then increase the number in the **Height of Space** box.

How do I delete the horizontal grid lines showing on the schedules?

1. Click **Options** on the toolbar.
2. Click **Preferences**. The **Preferences dialog** opens.
3. On the **Grids tab**, click to uncheck **Show Horizontal Grid Lines**.

How do I delete several rows of a grid at once?

The program will permit you to delete only one row at a time, but you can do this efficiently. Click the row in the Form pane and:

a. From the **Edit menu**, select **Grid Rows**, then select **Delete**.

or

b. Right-click the row, then select **Delete Row**.

I entered gift data in the wrong place. Can the entry be moved?

The program permits you to move one row of gift entry at a time. You may move information between Parts 1, 2, and 3 of Schedule A. Click the row in the Form pane and:

- From the **Edit menu**, select **Grid Rows**, then select **Move Gift**.

  or

- Right-click the row, then select **Move Gift**.

  or

  From the **Utilities menu**, select **Move Gift**. The **Gift Mover dialog** opens.

1. Select the grid from which the gift will be moved.
2. Select the grid to which the gift will be moved.
3. Select the gift to be moved.
4. Answer **Yes** to confirm that you wish to move the gift.

How do I scroll through the grid? I don't know how to find an item on the schedule.

- One way is to click on an item in the grid in the Form pane, then click the **Next Data Entry Pane button** until you reach the item you want.
- Another way is to use the **Go to Selected Row dialog**. This dialog lists all the rows on a grid, and shows the values in each column of the grid for all items,

so it is easy to find the item you want. Right-click on an item in the grid, then, on the shortcut menu, select **Go To Row**. Note you can click and drag on the divider of a column heading in the dialog to expand the displayed values.

The Spouse's split gifts aren't showing up on Schedule D, Part 3. How do I get the program to include these gifts here?

From the **Utilities menu**, select **Update Schedule D, Part 3**.

ADDING FORMS AND CONTINUATION SCHEDULES

How do I add forms to a return?

From the **Forms menu**, select **Add**. On the **Return Editor dialog**, click the form you want to add to the return, then click **Add**. To select multiple forms, press **Ctrl** or **Shift** as you click each form.

How do I add an additional Form 2848, Form 8275, or Form 8275-R?

At the top of the Return pane, right-click the **Tax Return icon**, select **Add**, then select **Form 2848**, **Form 8275**, or **Form 8275-R**. The duplicate forms are added to the bottom of the Return pane.

The return I'm working on has a lot of gifts. How do I add a continuation schedule?

Continue entering rows of data on the original schedule. When all rows of the schedule have been filled, the program automatically creates a continuation schedule — viewable at print time — as you insert new rows.

How do I add a continuation schedule to a return?

The program automatically adds continuation schedules to the return at print or preview time, based on what can fit on the IRS forms. There's nothing that you need to do.

ATTACHMENTS

How do I set up a "Sticky Note" in the program?

1. Right-click on the Form pane where you want to place your sticky note.
2. From the shortcut menu, click **New Comment**. The cursor changes shape to cross-hairs.
3. Click and hold down the left mouse button. Continue to hold down the mouse button while you drag the mouse diagonally down and to the right, until the

yellow Comment is the size and shape you want. (**Drag** means to hold down the left mouse button while moving the mouse.).

4. Release the mouse button. The **Comment Text Editor dialog** opens.
5. Enter your text into the **Comment Text Editor dialog**.
6. Click **OK**.

Note. Note: The sticky note can be marked to print (or not print) by right-clicking the note and selecting (or deselecting) **Always**, **Never**, or **By Return Set** from the **Print Options dialog**.

If you close the sticky note and need to edit its contents:

1. Right-click the sticky note. Its color changes to that of a selected field.
2. From the shortcut menu, click **Edit**. The **Comment Text Editor dialog** opens.
3. Edit your text, then click **OK**.

How do I add a note in the client file to display or print with the return?

You can add a note in the client file as follows:

- With the focus on the related schedule, from the **Forms menu**, select **Attachments**, select **Custom**, then select **Add**. Type the attachment's title in the Enter new title for custom attachment dialog, then click **OK**. Then, to enter the note itself, double-click the attachment in the Return pane to open the Custom Attachment Editor dialog.

  or

- In the **Return pane**, right-click the page to which you want to attach the note. Select **Add**, then select **Custom Attachment.** Double-click the new item titled **Custom Attachment**. Type your note and, if desired, rename the attachment as described below.

How do I change the title of an attachment displayed in the Return Pane?

You can change an attachment's title as follows:

- In the **Return pane**, click the attachment's title once to select it and then click again (do not double-click). The title is then highlighted and can be edited. To apply the changes, click outside the title.

  or

- In the Return pane, double-click the page (not the attachment) to which the attachment is related. From the **Forms menu**, select **Attachments**, select **Custom**, then select **Open**. The **Custom Attachments dialog** opens, listing all attachments related to the page. Click the title, then click **Rename.** On the Enter new title for custom attachment dialog, type the new title for the attachment, then click **OK**.

How do I move an attachment so that it prints after a different page or form?

In the Return pane, click the attachment’s title, then drag and drop onto another page.

CALCULATIONS

How do I recalculate the return?

- Press **F9** or click the **Recalc All** button to recalculate the values on the return.
- To update the diagnostic messages in the Messages pane, press **F10** or click the **Run Diagnostics button** .
- To update the split gift information from the spouse’s return, press **F11**.

How do I round the values on the gift tax return to dollars?

From the **Options menu**, select **Round to Dollars** to round the value of the open return.

Select **Round to Dollars** on the General tab of the Preferences dialog (accessed from the Options menu) to round future returns.

PRINTING AND DISPLAY

How do I prevent Form 2848 from printing in the return I print for my client?

You have complete control over the items that print in a return set.

From the **Options menu**, select **Return Sets**. In the **Defined Return Sets:** box, click **Standard Client**. Scroll through the **Include Forms and Schedules:** box, click the check box for Form 2848 to clear it, then click **OK**.

I can’t seem to preview the last item on a continuation schedule, although the item’s valuation is included in the totals.

Sometimes an item on a form cannot be previewed properly at a particular zoom setting on a particular monitor because of the monitor’s resolution, video driver, etc. Changing to a different zoom setting usually allows you to see the missing item. Even if you can’t see the item in the preview window, the item will be included in the printed return.

How do I keep unused forms and schedules from printing with the return?

Even if there is no data entered, all forms and schedules listed in the Return pane will print when you print a return. You can remove an unused form or schedule from the Return pane by right-clicking the unused for or schedule and selecting Remove.

Alternatively, to make sure unwanted forms are not printed:

1. From the **File menu**, select **Print**, select **Forms**, then select **Selected**.
2. When the **Select Forms to Print dialog** is displayed, double-click each form you want to print. After selecting each form you want to print, click **Print**.

How do I print just one form?

With the form or schedule to be printed open in the Form pane, from the **File menu**, select **Print**, select **Forms**, then select **Current Page** (or press **Ctrl**+**P**).

How do I print a Continuation Schedule without the form?

You can print a Continuation Schedule by itself as follows:

1. From the **Options menu**, select **Preferences**. On the **Printing tab**, select **Display Page Selection Dialog when Printing Selected Forms**. Click **OK**.
2. From the **File menu**, select **Print**, select **Forms**, then choose **Selected**. The **Select Forms to Print dialog** opens.
3. Click the schedule whose continuation schedule you want to print, then click **Print**. The **Print dialog** opens.
4. Make any changes needed in this dialog, then click **OK**. The **Select Pages to Print dialog** opens, with all pages preselected.
5. Click the pages that you want to print (the item for the continuation schedule will include "Cont" in its label), then click **OK**.

The printed form is missing words and lines.

Your printer may have lost fonts from memory or may not have enough memory to print the forms. Try turning off the printer and turning it back on again before reprinting a page from the return.

The form looks fine on screen, but the form prints oddly.

A printer font that the form needs may not be loaded. Call **Customer Support** at **800.424.2938** for assistance.

There is something odd about the appearance of the IRS form on-screen. I see a copyright symbol (©) displayed on Form 709 rather than the solid arrow found on the actual form. Also, the boxes holding the X's were missing. I see this both on the Form pane and in print preview.

The **709 Preparer** program may be missing a font. Re-install the 709 Preparer program and see if this fixes the problem for you.

If this does not work:

1. Go to the **Windows Start menu**, click **Settings**, then click **Control Panel**.
2. In the Control panel, double-click **Fonts**.
3. Scroll down to Super Symbols, click the item, then from the **File menu**, click **Delete**.
4. From the **File menu**, select **Install New Font**.The replacement font file is stored in the Resources/Fonts folder of the 709 Preparer program files.

How do I get zeros to display and print in a schedule's Value column?

In the Form pane, double-click the field for which you want to show zeros, then:

- From the **Edit menu**, select **Field Properties**, then select **Show Zeros**; or
- Right-click the field and, from the shortcut menu, select **Show Zeros**.

Repeat for each field that you want to show zeros.

How do I get rid of a zero that's displaying in an amount field?

In the Form pane, double-click the field for which you want to remove the zero, then:

- From the **Edit menu**, select **Field Properties**, then select **Show Zeros**; or.
- Right-click on the field and, from the shortcut menu, select **Show Zeros.**

Repeat for each field that you do not want to show zeros.

PREPARER DATABASE

How do I set up a preparer profile for my practice?

1. From the **Options menu**, select **Preparer Database**, then select **Edit**.
2. On the **Edit Preparer Information Database dialog**, click **New** then enter the preparer's name and other related information. Click **OK**.

   To set up additional preparers, repeat these steps.

If your practice has a network installation of the **709 Preparer**, all those using the program will share the preparer database and have access to the preparer profiles entered therein. When a profile is updated, everyone has immediate access to the updated profile.

I have several preparers already set up in a Preparer Database for 706 Preparer. Do I have to set up these preparers again for 709 Preparer?

No. You can share the same Preparer Database.

1. From the **Options** menu, highlight **Preparer Database**, then select **Path**.
2. In the **Open** dialog, locate and select your **706 Preparer's practitioners.inf** file, then click **Open.**

How do I specify a preparer for a return?

1. From the **Options menu**, select **Preparer Database**, then choose **Select**.
2. On the **Select Preparer for Correct Return dialog**, click the name of the preparer to be used on the return, then click **OK**.

The program will automatically use the preparer's information in the database when preparing Form 709 and the Transmittal letter.

What is the meaning of CAF Number, in the Occupation area of the Edit Preparer Information Database dialog?

The CAF Number is the Centralized Authorization File Number kept on file by the Internal Revenue Service.

UPDATES

I recently received my newly ordered program and discovered there is a new release of the program pending. Do I have to pay for the program update?

No. Program updates are distributed through the program's web update feature (click **Check for Update** on the Help menu). There is no additional charge for program updates distributed during your license term.

How do I know when a new release or program patch is available?

If you have access to the Internet, use either of the following procedures:

From the **Help menu**, click **Check for Update**. The program will tell you if a new maintenance release of the program is available on the Bloomberg Tax & Accounting Updates website. If a release is available, the program offers you an opportunity to connect to the site where you can download the release. To have the program automatically check for updates each time you open the program, open the **Preferences dialog** (accessed from the **Options menu**) and click the **Updates tab**. Then, select the **Enable Web Update checkbox** and the **Check for update at startup checkbox** and click **OK**.

-or-

Check for 709 Preparer updates by accessing our Web site – https://pro.bloombergtax.com/software-resources/. At the top of the page, click **See Support Options** (the “Customer Support” page opens), and select **Estate & Gift Tax 709 Preparer**. In the **Search Knowledge** area, click the arrow**.** Information about the current version of the program and what’s included in the version is listed. Alternatively, call customer support at 800.424.2938 and ask a technician if any program updates are available.

Can the program automatically check for program updates on your Web site?

Yes it can. If you select the **Enable Web Update** and **Check for update at startup** checkboxes on the **Preferences dialog’s Updates tab** (see **Options menu’s Preferences command**), each time you open a return (or start a new return), the program automatically checks the website for program updates and enables you to immediately download the update(s) each time you open the program. Even if you selected only the **Enable Web Update checkbox**, you could still download the update(s) by selecting the **Help menu’s** Check for Update command.

When “**Check for update at startup**” is selected, the program will indicate if an update is available upon launching of the program (if there is no update, the dialog will disappear). The updater will not check for updates when the user clicks “**New**” or “**Open**” from within the program.

MISCELLANEOUS

How do I access help for a specific field?

- In either the **Form pane** or the **Data Entry pane**, click the **Data Entry field** in question, then press **F1**.

  or

- From the **Help menu**, select **Help on spot**. Then click the field in question.

  or

- On the toolbar, click the **Help button** . Then click the field in question.

How do I add and delete users (Network version)?

1. Click the **709 Preparer Network License Administrator** shortcut icon (located on the Start menu/Programs/Bloomberg BNA program folder).

   The **Network License Administrator dialog** opens.

2. To remove a workstation ID from the list of registered workstations, select it from the list then click **Remove**.
3. Click **OK** to close the utility.

To add a new user: Run the workstation setup at the new workstation.

Note. This operation can only be performed by the Network Administrator or someone who has access to the Network License Administrator shortcut icon.

Note. The **Network License Administrator dialog** can also be accessed from any PC on which the client installation has been run. For further information, contact Customer Support at 800.424.2938.

How do I create a new return using a template?

1. From the **Options menu**, select **Preferences**. On the **General** tab of the **Preferences dialog**, select **Show Templates for New Returns**, then click **OK**.
2. From the **File menu**, select **New**. On the **New 709 Return dialog**, select **From a Template**, highlight a template from the list, then click **OK**.

Note. To set a template as the default, select **Set as default for future returns on the New 709 Return dialog**.

What are the different types of diagnostic messages in the Messages pane?

The messages are ranked according to severity as:

Error Messages

Warning Messages

Incomplete Messages

Informational Messages

What keyboard shortcuts does 709 Preparer offer?

You can access any menu or command using the standard Windows shortcut (Alt + underscored letter of the command or menu). 709 Preparer also provides several other keyboard shortcuts that allow you to bypass the menu system by pressing one or more keys to run program functions.

The shortcut keys shown in the following table are organized by subject or operation. Note that many commands can also be executed by clicking the appropriate button on the toolbar.

Return			
New 709 Return	Ctrl+N	Open Existing Return	Ctrl+O
Auto Calc Mode	Ctr+A	Round to Dollars	Ctrl+R
Apply Entries on Data Entry Pane to Form Pane	F5	Recalc Return	F9
Import Spouse’s Split Gifts	F11	Update Sch. D, Part 3	F12

Run Diagnostics	F10	Save Return	Ctrl+S
Print Current Form Page	Ctrl+P	Save Return As Template	Ctrl+T
Navigation			
Previous Page in the Return	Ctrl+Up Arrow	Next Page in the Return	Ctrl+Down Arrow
Previous Data Entry Pane	Ctrl+Left Arrow Alt+P Ctrl+Shift+P	Next Data Entry Pane	Ctrl+Right Arrow Alt+N Ctrl+Shift+N
Grid Rows			
Insert Row	Alt+Shift+I	Append Row	Alt+Shift+A
Sort Rows	Alt+Shift+S	Asset Mover	F8
Go to Row	Ctrl+G	Delete Row	Alt+Shift+D
Comments			
New Comment	Alt+Shift+N	Edit Comment	Alt+Shift+E
Move/Resize Comment	Alt+Shift+M	Remove Comment	Alt+Shift+R
Field Properties			
Select Font for Field Properties	Alt+Shift+F		
Text Editing			
Copy	Ctrl+C	Cut	Ctrl+X
Paste	Ctrl+V	Undo	Ctrl+Z
Redo	Ctrl+Y		
Miscellaneous			
Help	F1	Exit Program	Alt+F4

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