

# Estate & Gift Tax 706 Preparer™ from Bloomberg Tax & Accounting Version 2020.0

## Download and Installation Instructions

**Estate & Gift Tax 706 Preparer from Bloomberg Tax & Accounting** (version 2020.0) allows preparation of estate tax returns for deaths occurring in 2020. Note that you **must** install this new program version (2020.0) to a **new** folder. Follow these steps to download and install the program:

### 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 included in an email that was sent to the primary contact on the account.
3. Open your browser to <https://advantage.bloombergtaxtech.com/ElectronicFulfillment#/>.
4. Enter your **Customer ID and Access Code** and click **Next**.
5. Enter your **Name** and **Email Address**, and then click **Next**.
6. You will receive an email from **Product\_Delivery@bnasoftware.com** with a link to download the software. Open the email and **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.

### Single-User\* Installation Instructions

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. After you have read the **Welcome** panel, click **Next**.  
**Note.** The “Microsoft Visual C++ 2012 Redistributable Setup” installation screen will open if the version that is used by the program is not installed on your PC (see below). Otherwise, the **Welcome** panel will open.

**To complete the Microsoft Visual C++ Redistributable Setup, follow these steps:**

- a) The **Microsoft Visual C++ Redistributable Setup** screen opens. If you agree with the terms, click **I agree to the license terms and**

**conditions**, and then click **Install**.

- b) When the Microsoft Visual C++ Redistributable Setup program finishes installing, **Setup Successful** displays on the screen. Click **Close**.
3. At the **Setup Type** panel, select **Single Machine** and then click **Next**.
4. After you have read the **License Agreement**, if you agree with the terms, click **Yes** to proceed.
5. At the **Choose Destination Location** panel, install the program to a new folder. We recommend you accept the default drive and path (e.g., **C:\Program Files(x86)\Bloomberg BNA\BNA 706 Preparer 2020**). Click **Next**.
6. At the **Select Program Folder** panel, select a folder to hold program icons. We recommend accepting the default folder, **Bloomberg BNA**. Click **Next**. (The program files are installed.)
7. The query message **“To complete the installation you must run the program for the first time. Would you like to start it now? (Yes or No)”** displays. Select either **Yes** or **No**. We recommend that you select **Yes**.

After the program installation is complete, you can access the program through new shortcuts, such as the Start menu shortcut or the desktop icon, **BNA 706 Preparer (Form 2020)**. The initial default data folder for storing return files for local installations is: **My Documents\BNA 706 Preparer (Form 2020)**.

\*For instructions on installing the program to a network file server, see the **Estate & Gift Tax 706 Preparer Quick Start Guide**. The guide (in PDF format) is located in the root folder of the **Estate & Gift Tax 706 Preparer** folder and under the Help menu in the program.