

**Estate & Gift Tax 709 Preparer™**  
**from Bloomberg Tax & Accounting**  
**Version 2020.1**  
**Download and Installation Instructions**

**Estate & Gift Tax 709 Preparer (version 2020.1) from Bloomberg Tax & Accounting** allows preparation of gift tax returns for gifts made during 2020. Note that you **must** install this new program version (2020.1) 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 sent through an email to the main contact on the customer account.
3. Open your browser to **tax.bnasoftware.com** and click on **Electronic Fulfillment** in the top right corner.
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](mailto: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**.
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 709 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. A message informs you that the setup of the single user licensed version is complete. Select either **Yes, I want to restart my computer now** or **No, I will restart my computer later**. We recommend that you select **Yes**. Then, click **OK**.

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 709 Preparer (Form 2020)**. The initial default data folder for storing return files for local installations is: **My Documents\BNA 709 Preparer (Form 2020)**.

\*For instructions on installing the program to a network file server, see the **Estate & Gift Tax 709 Preparer Quick Start Guide**. The guide (in PDF format) is located in the root folder of the **Estate & Gift Tax 709 Preparer** application.