

TRUST & ESTATE ADMINISTRATION

709 Gift Tax Return Module

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

709 MODULE

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

FPS US Form 709: 2022 Gift (and Generation-Skipping Transfer) Tax Return: Registered to Margherita
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Form 709 (Page 1)

709 United States Gift (and Generation-Skipping Transfer) Tax Return OMB No. 1545-0020
Go to www.irs.gov/Form709 for instructions and the latest information.
(For gifts made during calendar year 2022)
See instructions.

Department of the Treasury
Internal Revenue Service

2022

1 Donor's first name and middle initial John
2 Donor's last name Doe
3 Donor's social security number 111-22-3456
4 Address (number, street, and apartment number) 100 Main Street
5 Legal residence (domicile) Pennsylvania
6 City or town, state or province, country and ZIP or foreign postal code New Hope PA 18974-1111
7 Citizenship (see instructions) United States

8 If the donor died during the year, check here ☐ and enter date of death: Yes No
9 If you extended the time to file this Form 709, check here ☒ X
10 Enter the total number of donees listed on Schedule A. Count each person only once: 2
11a Have you (the donor) previously filed a Form 709 (or 709-A) for any other year? If "No," skip line 11b. ☒ X
11b Has your address changed since you last filed Form 709 (or 709-A)? ☒ X
12 Gifts by husband or wife to third parties. Do you consent to have the gifts (including generation-skipping transfers) made by you and by your spouse to third parties during the calendar year considered as made one-half by each of you? (See instructions.) (If the answer is "Yes," the following information must be furnished and your spouse must sign the consent shown below. If the answer is "No," skip lines 13-18.) ☒ X
13 Name of consenting spouse: Linda Doe 14 SSN 888-76-5432
15 Were you married to one another during the entire calendar year? See instructions. ☒ X
16 If line 15 is "No," check whether: ☐ married ☐ divorced or ☐ widowed/deceased, and give date. See instructions.
17 Will a gift tax return for this year be filed by your spouse? If "Yes," mail both returns in the same envelope. ☒ X
18 Consent of Spouse. I consent to have the gifts (and generation-skipping transfers) made by me and by my spouse to third parties during the calendar year considered as made one-half by each of us. We are both aware of the joint and several liability for tax created by the execution of this consent.
Consenting spouse's signature: Date:
19 Have you applied a DSUE amount received from a predeceased spouse to a gift or gifts reported on this or a previous Form 709? If "Yes," complete Schedule C. ☒ X

1 Enter the amount from Schedule A, Part 4, line 11: 93,000
2 Enter the amount from Schedule B, line 3: 4,358,607
3 Total taxable gifts. Add lines 1 and 2: 4,451,607

CONTACT US TODAY

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