

GIFT TAX RETURN ORGANIZER
FORM 709

Donor's Full Name _____ SS# _____

Spouse's Name _____ SS# _____

Address _____

City, Town, or Post Office _____ County _____ State _____ Zip Code _____

Telephone Number _____ Telephone Number _____ Donor's Citizenship _____
Home (____) _____ Office (____) _____ Spouse's Citizenship _____

YES NO

- | | | | |
|----|--|-------|-------|
| 1. | Did donor die during the year? If yes, provide a copy of the death certificate. | _____ | _____ |
| 2. | Have gift tax returns been filed in prior years? If yes, provide copies, unless they were prepared by this firm. | _____ | _____ |
| 3. | Have previously filed gift tax returns been examined? If so, provide copies of examination reports. | _____ | _____ |
| 4. | Have the gifts (including generation-skipping transfers) to third parties during the calendar year been considered as made one-half by each spouse? If yes,: | _____ | _____ |
| | Were taxpayers married during entire year? | _____ | _____ |
| | Did taxpayers get married during the year? If yes, when? _____ | _____ | _____ |
| | Did taxpayers get divorced during the year? If yes, when? _____ | _____ | _____ |
| | Will each spouse file a gift tax return? | _____ | _____ |
| | Did the taxpayer's spouse die during the year? If yes, when? _____ | _____ | _____ |
| 5. | Has the donor's spouse made gifts? If so, complete a separate Form 709 organizer. | _____ | _____ |
| 6. | Were any of the above gifts made to or for the benefit of a trust? If yes, provide a copy of the trust instrument and the trust's identification number. | _____ | _____ |
| 7. | Does the value of any of the above gifts reflect a valuation discount? If so, provide a copy of the valuation report or the analysis upon which the discount is based. | _____ | _____ |
| 8. | Were any of the above gifts based upon an appraisal? If yes, provide a copy of appraisal. | _____ | _____ |

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9. Please complete:

DONEE'S NAME AND ADDRESS	RELATIONSHIP TO DONOR	DESCRIPTION OF GIFT	DONEE'S DATE OF BIRTH	DONOR'S ADJUSTED BASIS IN THE GIFT	DATE OF GIFT	VALUE AT DATE OF GIFT	IF SECURITIES, CUSIP NO.

If Donee is a trust, please provide the tax identification number.