

United States Quarterly Gift Tax Return

(Section 6019 of the Internal Revenue Code)

Calendar quarter ending (month and year) ▶

Donor's first name and middle initial	Donor's last name	Social security number	
Address (number and street)		Residence (domicile)	
City, State, and ZIP code		Citizenship	Yes No

If you (the donor) filed a previous Form 709, has your address changed since the last Form 709 was filed?

A Did you (the donor), during the calendar quarter written above (see instruction 1 for treatment of gifts in more than one quarter which aggregate more than \$3,000), without adequate and full consideration in money or money's worth, give to any one donee more than \$3,000 in value for the calendar year (or regardless of value if a future interest) as follows in items 1 through 8 below:			
1(a) by creating a trust for the benefit of a person or persons other than yourself in which you kept no power to revest the beneficial title to the property in yourself or to change the beneficiaries or their proportionate benefits? (If "Yes," attach a copy of the trust instrument.)	Yes	No	Yes
(b) by adding to such type trust previously created?	Yes	No	Yes
(c) by relinquishing every such power that was retained in a previously created trust?	Yes	No	Yes
2 by permitting a beneficiary, other than yourself, to receive the income from a trust you created in which you kept the power to revest the beneficial title to the property in yourself or to change the beneficiaries or their proportionate benefits?	Yes	No	Yes
3(a) by purchasing a life insurance policy with proceeds payable to a beneficiary other than your estate in which you kept no power to revest the economic benefits in yourself or your estate or to change the beneficiaries or their proportionate benefits?	Yes	No	Yes
(b) by paying a premium on such type policy previously issued?	Yes	No	Yes
(c) by relinquishing every such power that you kept in a previously issued policy?	Yes	No	Yes
4 by permitting another to withdraw funds that you deposited in a joint bank account?	Yes	No	Yes
5 by purchasing and/or conveying title to real property to your spouse and yourself as tenants by the entirety or as joint tenants with right of survivorship? (If "Yes," see instruction 9.)	Yes	No	Yes
6 by purchasing and/or conveying title to any other property to another and yourself as joint tenants?	Yes	No	Yes
7 by exercising or releasing a power of appointment?	Yes	No	Yes
8 by any other method, direct or indirect?	Yes	No	Yes

If the answer is "Yes" to any of the foregoing, each gift (other than the creation of a joint tenancy with your spouse in real property with right of survivorship, or addition thereto, which you do not elect to treat as a gift) must be fully disclosed in Schedule A.

B Gifts by husband or wife to third parties.—Do you consent to have the gifts by you and by your spouse to third parties during the calendar quarter(s) considered as made one-half by each of you? (See instruction 8.)

(If the answer is "Yes," the following information must be furnished and the consent shown below signed by your spouse.)

1(a) Name of spouse	1(b) Social security number		
2 If the consent is effective for gifts made in a previous quarter(s) of the calendar year and no return was filed for such previous quarter(s) (see instruction 1) and such gifts are being reported on this return (see instruction 10), write the previous quarter(s) ending (month and year) in addition to the current quarter ending (month and year).		Yes	No
3 Were you married during the entire calendar quarter(s)?		Yes	No
4 If the answer to 3 is "No," check whether <input type="checkbox"/> married, <input type="checkbox"/> divorced, or <input type="checkbox"/> widowed, and give date ▶		Yes	No
5 Will a gift tax return for this calendar quarter be filed by your spouse?		Yes	No

Consent of Spouse—I consent to have the gifts made by me and by my spouse to third parties during the calendar quarter(s) 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.

Spouse's signature ▶	Date ▶
Computation of Tax	
1 Enter the amount from Schedule A, line j	1
2 Enter the amount from Schedule B, line c	2
3 Total (add amounts on lines 1 and 2)	3
4 Tax computed on amount on line 3 (See "Table for Computing Gift Tax" in separate instructions.)	4
5 Tax computed on amount on line 2 (See "Table for Computing Gift Tax" in separate instructions.)	5
6 Balance (subtract amount on line 5 from amount on line 4)	6
7 Credit for foreign gift taxes (see instruction 20)	7
8 Tax due (subtract amount on line 7 from amount on line 6)	8

Please attach the necessary supplemental documents; see instruction 15.

Under penalties of perjury, I declare that I have examined this return, including any accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete. If prepared by a person other than donor, this declaration is based on all information of which the preparer has any knowledge.

Donor's signature _____ Date _____

Preparer's signature (other than donor) _____ Date _____

Preparer's address (other than donor) _____

SCHEDULE A—Computation of Taxable Gifts

Item number	Donee's name and address, description of gift, and numerical subpart of question A on page 1 where gift was disclosed, such as A1(a) or A3(a)	Donor's adjusted basis of gift	Date of gift	Value at date of gift
1				

(a) Total gifts of donor	_____
(b) One-half of items to attributable to spouse (see instruction 11)	_____
(c) Balance (subtract amount on line b from amount on line a)	_____
(d) Gifts of spouse to be included (from line b of spouse's return) (see instruction 11)	_____
(e) Total gifts (add amount on lines c and d)	_____
(f) Total exclusions not exceeding \$3,000 for the calendar year for each donee (except gifts of future interests)	_____
(g) Total included amount of gifts (subtract amount on line f from amount on line e)	_____
(h) Deductions (see instructions 16, 17, and 18):	
(1) Charitable, public, and similar gifts (based on items to, less exclusions)	_____
(2) Marital deduction (based on items to)	_____
(3) Specific exemption claimed	_____
(i) Total deductions (add amounts on lines 1, 2, and 3)	_____
(j) Amount of taxable gifts (subtract amount on line i from amount on line g)	_____

SCHEDULE B—Returns, Amounts of Specific Exemption, and Taxable Gifts for Prior Periods

1 Did you (the donor) file gift tax returns for prior periods? Yes No
 (If "Yes," follow instruction 19 in completing Schedule B below.)

Calendar years (prior to 1971) and calendar quarters (1971 and subsequent years)	Internal Revenue office where prior return was filed	Amount of specific exemption	Amount of taxable gifts

(a) Totals for prior periods (without adjustment for reduced specific exemption)	_____
(b) Amount, if any, by which total specific exemption, line a, exceeds \$30,000 (see instruction 19)	_____
(c) Total amount of taxable gifts for prior periods (add amount, last column, line a, and amount, if any, line b)	_____

(If more space is needed, attach additional sheets of same size.)