

## Introduction

# Welcome to the IRS Gift Tax Return Burden Survey

Thank you for taking the time to provide us feedback. Please answer all questions with reference to the Form 709, gift tax return filed for Tax Year 2021. At any time you can leave the survey and come back to complete it. The survey will pick up from the last page you completed.

If you need assistance, please email us at [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov) or call 202-803-9833. You can find a Frequently Asked Questions (FAQ) document and copy of the full survey in links below. These links will be available throughout the survey.

### **Privacy Act and Paperwork Reduction Act Notice for Gift Tax Return Taxpayer Burden Model Data Collection**

Our authority for requesting information with this survey is 5 U.S.C. § 301, and 26 U.S.C. 7801, 7803, and 7805 and the Paperwork Reduction Act. The information you provide allows the IRS to analyze the role of taxpayer burden in tax administration. This information is also used to fulfil the IRS's statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. This information will also help us to better understand taxpayer needs and burden reduction opportunities. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected as required by law. We estimate that it will take 10 to 15 minutes to complete this survey, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Providing the information is voluntary; not providing all or part of the information requested will have no impact on you but may reduce our ability to address taxpayer concerns regarding paperwork reduction. We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-2212. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

## Tax Preparation Methods and Activities

# Tax Preparation Methods and Activities

Please answer all questions with reference to your Tax Year 2021 federal gift tax return.

Which of the following methods did you use to prepare your Tax Year 2021 federal gift tax return?

Please select all that apply.

- A tax preparation service (e.g., H&R Block)
- A third-party paid preparer (e.g., accountant, bookkeeper, lawyer, an enrolled agent, registered tax preparer)
- Tax preparation software (e.g., BNA Estate & Gift Tax 709 Preparer™, CCH® ProSystem fx® Suite, ONESOURCE™, custom software)
- Any other method(s)

## Tax-Related Recordkeeping

# Tax-Related Recordkeeping

Please think about your gift and donation tax-related recordkeeping. Tax-related

recordkeeping includes all the activities you did to create, maintain, and store records needed to complete your gift tax return.

**Which of the following recordkeeping systems did you use in Tax Year 2021 to keep track of federal gift tax-related records?**

Please select all that apply.

- General recordkeeping software products such as Excel, IBM Notes, OpenOffice
- A checking or investment account from which the gifts or charitable donations are paid
- A separate hard-copy ledger to record gifts and charitable donations
- Any other tax-related recordkeeping system during Tax Year 2021

Please describe:

Time Spent Verify Block

## **Time Spent on Gift Tax-Related Activities**

Think about all the time you spent on tax-related recordkeeping, tax planning, gathering tax-related materials, learning about tax law, using IRS or non-IRS resources, completing, reviewing, and submitting your Tax Year 2021 federal gift tax return, and calculating and depositing estimated tax payments.

**Please include time spent:**

- On your Tax Year 2021 federal gift tax return as well as any associated forms, schedules, and worksheets that you completed or filed throughout the tax year as well as the tax filing season
- Corresponding or speaking with your tax professional(s)

**Please do NOT include time spent:**

- By your tax professional(s)
- On any state gift tax return(s)
- On your federal, state, or local income tax returns
- On other types of tax or information returns
- Responding to IRS notices or correspondence

**How much time did you spend on the following activities for your Tax Year 2021 federal gift tax return?**

If you're not sure, please provide your best estimate. If you did not spend any time on the activity, enter 0.

	Hours	Minutes
A. Tax Recordkeeping, including reconciling financial and tax records	<input type="text" value="0"/>	<input type="text" value="0"/>
B. Tax Planning	<input type="text" value="0"/>	<input type="text" value="0"/>
C. Gathering materials, learning about tax law, and using IRS or non-IRS resources	<input type="text" value="0"/>	<input type="text" value="0"/>
D. Calculating and depositing estimated tax payments	<input type="text" value="0"/>	<input type="text" value="0"/>
E. Completing and submitting the federal gift tax return	<input type="text" value="0"/>	<input type="text" value="0"/>
F. All other federal gift tax-related activities	<input type="text" value="0"/>	<input type="text" value="0"/>

You reported spending a total of 0 hours and 0 minutes on Tax Year 2021 gift tax-related return activities. Please click next to proceed.

You reported  $\{q://QID50/ChoiceNumericEntryValue/6/1\}$  hours and  $\{q://QID50/ChoiceNumericEntryValue/6/2\}$  minutes in other federal gift tax-related activities. Please describe those activities.

### Costs Associated with Tax Compliance

## Costs Associated with Tax Compliance

Please think about how much money you spent to comply with your Tax Year 2021 gift tax reporting requirements.

If you're not sure, please provide your best estimate. If you did not spend any money on the activity, enter 0.

- A. How much did you pay a tax professional for tax planning related to your Tax Year 2021 federal gift taxes? \$
- B. How much did you pay a tax professional to prepare your Tax Year 2021 federal gift tax return? \$
- C. How much did you spend on tax software to prepare your Tax Year 2021 federal gift tax return? \$
- D. How much did you spend on other tax activities related to federal gift tax reporting for Tax Year 2021? This may include money spent on electronic submission, photocopies, tax research services, tax publications and journals, transportation, postage, or IRS user fees. \$
- Total \$

# Additional Questions

Did you file a state gift tax return for Tax Year 2021?

- Yes
- No
- I don't know

Based on your experience, what do taxpayers find to be the most difficult part of complying with the federal gift tax reporting responsibilities?

Please provide any suggestions for how the IRS could improve the federal gift tax reporting experience or taxpayer service in general.

Finish

You have finished the survey.

Please click on the "Submit" button on the bottom right to submit your survey.  
Once the survey is submitted, you will not be able to return to the survey.

At any time you can leave the survey and come back to complete it.  
The survey will pick up after the last page you completed.

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[Frequently Asked Questions \(FAQ\)](#)

[Preview Survey](#)

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Technical Assistance 1.202.803.9833 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)

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