

HOW 6-IN-1 WORKS

CREATE NEW ESTATE OR TRUST

Enter in General Information about your Estate, Trust or other entity which includes pertinent information such as decedent, grantor, fiduciaries, attorney and residency details as applicable.



ADD TRANSACTIONS

Enter in your Assets, Debts, Distributions, Income and Expenses ONE TIME and code them by using our list of code categories that cover every type of transaction.

The code determines where the transaction will display on each document and the software will show these destinations.



REVIEW DOCUMENTS

Easily access each document before printing to review the data entered.



PRINT OR E-FILE

6-in-1 allows you to print to PDF to make sure the information is correctly displayed. You can then send to your printer or save to a local drive. Fiduciary returns can be e-filed directly through the program (state-dependent).



LACKNER GROUP

Data is entered just once and is reflected correctly on each return



U.S. Gift Tax Return (709) is also available

SAVE TIME & SAVE MONEY