

The Lackner Group, Inc.
6-in-1 Release Notes
February 19, 2025
v2025-050

Highlights of This Update

- **PA-41 RK-1 Line 1 Income of/from Estates or Trusts:** **SOLVED**
- **US 709: Page 1, Line 19, Gift made to third parties:** **SOLVED**
- **Standalone and Server Installations**
 - **Lackner Connect:** **SOLVED**
 - **Desktop FileMaker Pro:** **SOLVED**
 - **Server FileMaker Pro and Server:** **SOLVED**
- **Server SSL Certificates:** **SOLVED**
- **Running 6-in-1 Updates:** **SOLVED**

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A

Releases This Season

1st Release

2025-031 (01/31/2025)

2nd Release

2025-037 (02/06/2025)

3rd Release

2025-050 (02/19/2025)

Password: **showtime**

[6-in-1 Downloads and Installation Instructions](#)

B

PA-41 RK-1 Line 1

PA-41 RK-1 Line 1 Income of/from Estates or Trusts.

We modified that calculation back in mid-December solely to simplify it. But it turns out that we **over**-simplified it by inadvertently omitting a necessary "min" (minimum) function. Thus, if you were entering dollar figures for Tier 1/2 amounts going to beneficiaries, the RK-1 was reporting the **entire** income distribution deduction to each beneficiary, not just a pro rata share.

This update resolves that issue, which we did fix over Screen Connect during the past week for about 20 firms. If you were assigning percentages to each beneficiary (rather than dollar amounts), that calculation was working just fine.

C

709, Page 1, L19

US 709 (Gift Tax)

At the Heckerling Institute on Estate Planning in Orlando this past January 13-17, a 709 panel questioned the instructions for new Line 19 on Page 1. That question asks whether donor and spouse **made** gifts to third parties. If the answer is "Yes", then Page 2, Part III, should be completed. Part III, Line 1, then asks whether the donor and spouse **consent** to treating these gifts as made one-half by each.

These are distinct questions, but the 709 instructions released on 10/16/2024 treated these questions as the same (**consent**). Our earlier releases (2025-031 and 2025-037) did the same. Version 2025-050 revises the software to treat these two questions as separate questions.

We and another developer did alert the IRS to this inconsistency and understood that the IRS would be changing the instructions. We discovered earlier this week, however, that the revised instructions dated 1/21/2025 did **not** make this change, and we immediately pointed this out. The IRS is now fully aware of the issue and will likely revise the instructions to match the form.

Other changes to the 709:

- **Page 1, Line 18a:** Reference to 11b changed to 18b.
- **Page 1, Paid Preparer's Name:** tiny white object removed.
- **Part III, Line 7:** New Y/N check box field. Previously the same field was being used for both Line 6 and Line 7.
- **Schedules A, B, and C:** Landscape printing now navigates to the proper pages without displaying instructional text on the right side of the page.
- **Schedule A-3 (Page 5), Column (g), Value at Date of Gift:** Font size reduced by one point in order to display amounts up to \$99M.
- **Schedule B (Page 7, Gifts from Prior Periods):** If this schedule is blank for gifts made in 1977-2023 but that schedule is selected on the Print Options screen, the second page of Schedule B (gifts made in 2005-2023) will print (in blank).
- **Schedule C (Page 8, DSUE):** DSUE question (from Page 1, Line 20) displayed at the bottom for your convenience, in order to activate display of the DSUE results above.

14 If the donor died during the year, check here and enter date of death _____

15 If an amended return, check here

16 If you extended the time to file this Form 709, check here

17 Enter the total number of donees listed on Schedule A. Count each person only once. **1**

18a Have you (the donor) previously filed a Form 709 (or 709-A) for any other year? If "No," skip line 18b. **Display Exclusion Info YN**

18b Has your address changed since you last filed Form 709 (or 709-A)?

19 Gifts by husband or wife to third parties. Did you and your spouse **make gifts** to third parties? See instructions. (If the answer is "Yes," complete Part III on page 2.)

	Yes	No
18a		X
18b		X
19		X

Form 709 (2024) **0 2024** Page 2

Part III Spouse's Consent on Gifts to Third Parties Part I, Line 19. Did you and your spouse **make gifts** to third parties? Yes No

1 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. **If the answer is "No," skip lines 2-7.**) **?**

2 Name of consenting spouse _____

3 SSN of consenting spouse _____

4 Were you married to one another during the entire calendar year? See instructions. **Blank**

5 If line 4 is "No," check whether married divorced or widowed/deceased, and give date. See instructions _____

6 Will a gift tax return for this year be filed by your spouse? (If "Yes," mail both returns in the same envelope.) _____

7 **Consent of Spouse.** Have you obtained required spousal consent for gifts made to third parties to be considered as made one-half by each spouse? If "Yes," you must attach a Notice of Consent. See instructions.

	Yes	No
1		
2		
3		
4		
5		
6		
7		

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14 If the donor died during the year, check here and enter date of death _____

15 If an amended return, check here

16 If you extended the time to file this Form 709, check here

17 Enter the total number of donees listed on Schedule A. Count each person only once. **1**

18a Have you (the donor) previously filed a Form 709 (or 709-A) for any other year? If "No," skip line 18b. **Display Exclusion Info YN**

18b Has your address changed since you last filed Form 709 (or 709-A)?

19 Gifts by husband or wife to third parties. Did you and your spouse **make gifts** to third parties? See instructions. (If the answer is "Yes," complete Part III on page 2.)

	Yes	No
18a		X
18b		X
19	X	

Form 709 (2024) **0 2024** Page 2

Part III Spouse's Consent on Gifts to Third Parties Part I, Line 19. Did you and your spouse **make gifts** to third parties? Yes No

1 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. **If the answer is "No," skip lines 2-7.**) **?**

2 Name of consenting spouse **Spouse**

3 SSN of consenting spouse **123456**

4 Were you married to one another during the entire calendar year? See instructions. **Filled**

5 If line 4 is "No," check whether married divorced or widowed/deceased, and give date. See instructions **01/01/2025**

6 Will a gift tax return for this year be filed by your spouse? (If "Yes," mail both returns in the same envelope.) _____

7 **Consent of Spouse.** Have you obtained required spousal consent for gifts made to third parties to be considered as made one-half by each spouse? If "Yes," you must attach a Notice of Consent. See instructions.

	Yes	No
1		
2		
3		
4		X
5		
6		X
7	X	

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D

Standalone and Server Installations

Upgrades last week and earlier this week did not go completely according to plan for some firms installing FileMaker and "Lackner Connect" on Desktops and/or Servers. We have listed below some of the variables involved.

Desktops (Standalone)

- **FileMaker 19:** Need to upgrade to FileMaker Pro 20 in order to run the new Lackner Connect utility.
- **Two Versions of Windows:** 10 and 11. Fortunately not a single customer was running any of the following versions of Windows: 8, 7, Vista, XP, ME (Millennium Edition), 2000, 98, NT, 95, 3.1, 3.0, 2.1, 2.0, or 1.0. Also, no IBM PC or PC Jr. (aka "Peanut"). We were spared.
- **6-in-1 Data Files:** We did our best to determine the location of these files by checking the Windows Registry for existing installations.
- **Customer ID:** In the absence of this information, we then tried to identify the location by connecting your Customer ID (Site ID) with our records. Between February 10 and 14, we received 25 tech support tickets where users were stuck in the installation process on **Desktops**. Of these 25, 19 generated a "no configuration is available" error message. We have eliminated that error condition.

Desktops (Connecting to FileMaker Server)

- **Increasingly Security-Conscious World.** Because of expectations for greater and greater security, it was time to address security with FileMaker Server.
- **Server Identity:** For several years, FileMaker Pro 19 (now 20) has been generating a warning that it "cannot verify the identity of [server]".
- **SSL Certificate:** This warning goes on to read as follows:
"SSL Certificate Not Valid. An SSL certificate encrypts data sent to and from the host to keep the data private. The certificate for this host is invalid and it can't be verified. Do you want to connect anyway?"
- **Always permit connection to this host.**

- **Local Area Networks.** Because these connections are typically internal, we simply had users check the "Always permit" box.
- **🔒 Red Unlock Icon:** "Indicates that important security features are currently disabled." This **red** icon would display in the upper right corner of FileMaker Pro
- **🔒 Green Lock Icon:** "Typically signifies a secure connection on a website, meaning that the data transmitted between your browser and the site is encrypted and protected from being intercepted by third parties." With the installation of an SSL Certificate on the FileMaker Server end of this configuration, this **green** icon confirms that the connection is now encrypted and secure. See below for details on SSL Certificates.
- **SOC 2 Compliance:** "System and Organization Controls 2 ["SOC 2"] is a compliance standard for service organizations that assesses their security practices related to customer data, managed by the American Institute of Certified Public Accountants (AICPA)." We are now engaged in a process of obtaining SOC 2 Certification for our company. More to come.

Server Machines (Multi-User Installations running FileMaker Server software)

- **Operating Systems:** Windows 10 or 11, Windows Server 2012, 2016, 2019, 2022, or 2025.
- **FileMaker Server ("FMS"):** 19, 20, or 21. FMS 21, which requires a minimum of Windows Server 2019, provides the best experience in terms of security and performance.
- **SSL ("Secure Sockets Layer") Certificates:** Between February 10 and 14, we received 50 tech support calls where users were stuck in the installation process on servers. Nearly all of them related to the need for installation of an "SSL Certificate". **Within the past 72 hours we spoke several times with two consultants who are among the world's top experts on all aspects of FileMaker Server, and they helped us automate installation of these certificates.**
- **Firewalls:** Communication through these **ports** enabled (defaults 5003, 443; alternatives 5004, 4443, 8443).
- **Anti-Virus Software:** Often interferes with installations and should be temporarily disabled during this process.

E

SSL Certificates

Without getting too technical for non-IT personnel, we thought that the following "AI Overview" might be helpful:

Secure Sockets Layer: A security protocol that protects network connections. We often think of SSL with respect to connections of the internet, but it can also apply to connections on our local networks.

SSL Certificates

An SSL certificate is a digital file that verifies a website's identity and encrypts communication between two applications. This is often a website and a user's browser. In our case, however, it relates to FileMaker Pro and FileMaker Server. SSL certificates are used to secure websites, online transactions, and logins.

How SSL certificates work

- SSL certificates are hosted on the application's server.
- When a user connects with an SSL certificate, the computer is able to verify the server's identity using the certificate's public key.
- The user's computer (specifically, the browser or, in our case, FileMaker Pro) encrypts communication with the website using SSL/TLS.
- SSL certificates are issued by a trusted third party called a Certificate Authority (CA).

Benefits of SSL certificates

- SSL certificates help establish trust between users and websites or other services.

F

Running 6-in-1 Updates

If you are already running Lackner Connect and installed either 2025-031 or 2025-037, then your FileMaker versions should be up to date. You should simply click on the Update button in Lackner Connect and follow the prompts. On servers, no need to stop the FileMaker Server service. Lackner Connect will run the update, then return you to your menu.

If you have not yet installed either 2025-031 or 2025-037, then please take the following steps:

1. FileMaker engine: [Lackner Downloads](#) This updates you as follows:

Desktop: FileMaker Pro 20

Server: FileMaker Pro 20 (to run updates)

FileMaker Server 21 (Win Server 2019 or later)

FileMaker Server 20 (otherwise) *

Lackner Connect: installed on both Desktops and Servers

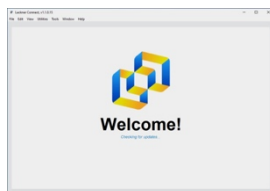
Password: **showtime**

* Future releases will depend on FileMaker Server 21. Please consider moving toward a current version of Windows Server (2022 or later).

2. 6-in-1 Updates: Simply launch 6-in-1. You will be guided to click a few buttons to perform the update to 2025-050.

Lackner Connect ("new frontier")

After you perform Step #1 (if necessary), you should see this icon on the desktop (user desktop in "Standalone" mode or server desktop in "Multi-User" mode).



Lackner Connect is a new utility that helps you manage your Lackner Software and facilitates automatic updates.

Note #1: If you are in a multi-user environment ("Multi-User ON" at the top of your 6-in-1 Main Menu), you **must** run the update **on the server machine**, not on a workstation.

Note #2: At the server, unlike all prior updates, keep the FileMaker Server service ON under Services. Lackner Connect will take care of closing the 6-in-1 files while FileMaker Server is still running, then opening them after the update is finished.

Installation Instructions (on Downloads web page)

Standalone: [UPDATE Installation Instructions](#)

Server: [UPDATE Installation Instructions](#)

Please see our e-mail announcement of 2/11/2025 for details on what version 2025-037 contained.

You should also take time to review the [Release Notes 2025-037](#). It is as comprehensive a document as we have ever produced. The tips and tricks are things that you would want to know about now and not later.

You can download a PDF version of these documents via the icon on the right side of that page.

Important note: Some users will be prompted to enter a Customer ID (format ABCD101). Be sure to note it (6-in-1 Opening Screen, bottom) just in case you are prompted at the end of the update. In all future updates, the Customer ID will be rolled forward every time.