

Notice Concerning Fiduciary Relationship
 ► Information about Form 56 and its separate instructions is at www.irs.gov/form56.
 (Internal Revenue Code sections 6036 and 6903)

Part I Identification

Name of person for whom you are acting (as shown on the tax return)	Identifying number	Decedent's social security no.
Address of person for whom you are acting (number, street, and room or suite no.)		
City or town, state, and ZIP code (If a foreign address, see instructions.)		
Fiduciary's name		
Address of fiduciary (number, street, and room or suite no.)		
City or town, state, and ZIP code	Telephone number (optional)	

Section A. Authority

1 Authority for fiduciary relationship. Check applicable box:

a Court appointment of testate estate (valid will exists)

b Court appointment of intestate estate (no valid will exists)

c Court appointment as guardian or conservator

d Valid trust instrument and amendments

e Bankruptcy or assignment for the benefit of creditors

f Other. Describe ► _____

2a If box 1a or 1b is checked, enter the date of death ► _____

b If box 1c-1f is checked, enter the date of appointment, taking office, or assignment or transfer of assets ► _____

Section B. Nature of Liability and Tax Notices

3 Type of taxes (check all that apply): Income Gift Estate Generation-skipping transfer Employment
 Excise Other (describe) ► _____

4 Federal tax form number (check all that apply): **a** 706 series **b** 709 **c** 940 **d** 941, 943, 944
e 1040, 1040-A, or 1040-EZ **f** 1041 **g** 1120 **h** Other (list) ► _____

5 If your authority as a fiduciary does not cover all years or tax periods, check here ►
 and list the specific years or periods ► _____

6 If the fiduciary has a CAF number and wants a copy of notices and correspondence (**see the instructions**) check this box ►
 and enter the year(s) or period(s) for the corresponding line 4 item checked. If more than one form entered on line 4h, enter the form number.

Complete only if the line 6 box is checked.

If this item is checked:	Enter year(s) or period(s)	If this item is checked:	Enter year(s) or period(s)
4a		4b	
4c		4d	
4e		4f	
4g		4h:	
4h:		4h:	