

# Notice Concerning Fiduciary Relationship

► Go to [www.irs.gov/Form56](http://www.irs.gov/Form56) for instructions and the latest information.  
(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.
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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)
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## 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 ► \_\_\_\_\_

For Paperwork Reduction Act and Privacy Act Notice, see separate instructions.