

Notice Concerning Fiduciary Relationship

(Internal Revenue Code sections 6036 and 6903)

▶ Go to www.irs.gov/Form56 for instructions and the latest information.

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 Fiduciary of intestate estate
 - e Valid trust instrument and amendments
 - f Bankruptcy or assignment for the benefit of creditors
 - g Other. Describe ▶ _____
- 2a If box 1a, 1b, or 1d is checked, enter the date of death ▶ _____
- b If box 1c, 1e, 1f, or 1g 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 or 1040-SR 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.