

Notice Concerning Fiduciary Relationship

(Internal Revenue Code Sections 6036 and 6903)

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

OMB No. 1545-0013

Part I Identification

1 Name of person for whom you are acting (as shown on the tax return)	2 Identifying number	3 Decedent's social security no.
FIRST MIDDLE LAST-VESSEL		123-45-6789
4 Address of person for whom you are acting (number, street, and room or suite no.)		
123 FIRST STREET		
5 City or town, state, and ZIP code (If a foreign address, see instructions.)		
ANYWHERE, PA 12345		
6 Fiduciary's name		
First Middle Last-Executor		
7 Address of fiduciary (number, street, and room or suite no.)		
c/o rural route 123 First Street		
8 City or town, state, and ZIP code	Telephone number (optional)	
Anywhere, Pennsylvania zip exempt	()	

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

9 g ☒ Other. Describe ► Genesis 1:26-28, Genesis 2:7, Job 32:21 & 22

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

10 b If box 1c, 1e, 1f, or 1g is checked, enter the date of appointment, taking office, or assignment or transfer of assets ► date you were born

Section B. Nature of Liability and Tax Notices

11 3 Type of taxes (check all that apply): ☐ Income ☐ Gift ☐ Estate ☐ Generation-skipping transfer ☐ Employment
☐ Excise ☒ Other (describe) ► Tariffs and Sales Taxes

12 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) ► Any or none that may apply

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.

Cat. No. 16375I

Form **56** (Rev. 12-2019)

13 My vessel, (insert ALL CAPS original birth certificate name), was created on (insert date your BC was RECORDED). I have since changed my name to (insert current name, upper and lower case), hence the different names between the vessel and executor(or executrix) on this form.

Initials

Part II Revocation or Termination of Notice**Section A—Total Revocation or Termination**

6 Check this box if you are revoking or terminating all prior notices concerning fiduciary relationships on file with the Internal Revenue Service for the same tax matters and years or periods covered by this notice concerning fiduciary relationship ☒ Reason for termination of fiduciary relationship. Check applicable box:

- a** ☐ Court order revoking fiduciary authority
b ☐ Certificate of dissolution or termination of a business entity
c ☒ Other. Describe **15** ▶ Tax exempt foreign estate or trust 26 USC 7701 (a)(31)

Section B—Partial Revocation

7a Check this box if you are revoking earlier notices concerning fiduciary relationships on file with the Internal Revenue Service for the same tax matters and years or periods covered by this notice concerning fiduciary relationship ☐
b Specify to whom granted, date, and address, including ZIP code.

▶ _____

Section C—Substitute Fiduciary

8 Check this box if a new fiduciary or fiduciaries have been or will be substituted for the revoking or terminating fiduciary and specify the name(s) and address(es), including ZIP code(s), of the new fiduciary(ies) ☐
 ▶ _____

Part III Court and Administrative Proceedings

Name of court (if other than a court proceeding, identify the type of proceeding and name of agency)		Date proceeding initiated	
Address of court		Docket number of proceeding	
City or town, state, and ZIP code	Date	Time <input type="checkbox"/> a.m. <input type="checkbox"/> p.m.	Place of other proceedings

Part IV Signature

Please Sign Here	Under penalties of perjury, I declare that I have examined this document, including any accompanying statements, and to the best of my knowledge and belief, it is true, correct, and complete.		
	16 <u>By: :First-Middle; .Last:</u> Fiduciary's signature	17 <u>Executor</u> Title, if applicable	18 <u>8/4/2022</u> Date

Form **56** (Rev. 12-2019)

19 I wish to be indemnified against claims or losses under the sovereign usa Private Registered Indemnity Bond (insert registered mail tracking number).

How to Fill-Out Form 56

Page 1

- ① Use your All Caps name from your original (first) birth certificate. Put '-VESSEL' after your vessel name. Example: JOHN QUINCY PUBLIC-VESSEL
- ② Identifying number: Use the federal reserve bank routing number found on the back of your Social Security card. Include the beginning letter of the number. If you do NOT have a bank routing number on your SS card, use the birth registration # (also called State File No.) from your state issued birth certificate. **DO NOT** get a new Social Security card in order to fill out this form. The birth registration # is sufficient.
- ③ Decedent's social security no.: Enter your social security number. **DO NOT** put your SSN in square brackets.
- ④ Your federal overlay mailing address in ALL CAPS.
- ⑤ Your federal overlay city, 2 digit state abbreviation and zip code IN ALL CAPS
- ⑥ Fiduciary name: Your current name in upper and lower case. Put '-Executor' (for males) or '-Executrix' (for females) after your current name.
Examples: John Quincy Public-Executor Jane Ann Public-Executrix
- ⑦ Your non-federal address. Upper and lower case. All words spelled out. NO abbreviations.
Example: c/o rural route 123 First Street
- ⑧ Your non-federal city, state (spelled out) and zip exempt
Example: Anywhere, Pennsylvania zip exempt
- ⑨ 1g: Check the 'Other' box and type exactly what is shown on the Form 56 sample template
- ⑩ 1b: Date you were born. Example: 1/2/1961
- ⑪ 3: Check the 'Other' box and type exactly what is shown on the Form 56 sample template
- ⑫ 4: Check the 'Other' box and type exactly what is shown on the Form 56 sample template
- ⑬ **CAUTION:** Only use this statement if your current name is different from your original birth name. Otherwise, leave this statement off your Form 56.
Hand print this statement in purple ink. **Important:** The date your BC (birth certificate) was recorded is the FILE DATE (sometimes called registered date) shown on your BC. This is the day your vessel was created. Executor if male, executrix if female. At the end of the statement, put your initials in cursive writing at a 45 degree angle.
- ⑭ Here is where you will use your 'CERTIFIED TRUE COPY' stamp. **AFTER** you have completed and autographed Form 56, you will make several color copies of your Form 56. **One** of your color copies **DOES NOT** get the CERTIFIED TRUE COPY stamp. This is the copy you will record with. The number of color copies you need with the stamp depends on how many recipients you are mailing the Affidavit of Status to. Refer to Form 56 Process instructions.
Autograph your current name in cursive, parse syntax, purple ink directly under the CERTIFIED TRUE COPY stamp. Example: *By: : John-Quincy; .Public:*

How to Fill-Out Form 56

Page 2

- 14 6: Check the box at the end of the statement. **Caution:** most people miss checking this box and have to start the Form 56 process all over again. **CHECK THE BOX :-)**
- 15 6c: Check the 'Other' box and type exactly what is shown on the Form 56 sample template
- 16 Your autograph, in cursive, parse syntax purple ink
Example: *By: : John-Quincy; .Public:*
- 17 Handwrite in purple ink Executor or Executrix as applies
- 18 Handwrite in purple ink the date you autograph Form 56
- 19 **OPTIONAL, NOT REQUIRED:** you will only be able to use this statement if you have registered mail tracking number label on-hand. And that is because you have to make your TRUE CERTIFIED COPY(s) of Form 56 before you go to the post office to mail.
Pay close attention the 'usa' is NOT in all caps and that 'Private Registered Indemnity Bond' has the first letters of each word capitalized. Hand print this statement.

General: as always, anything shown in red ink on the template is to draw your attention. Change the color as needed to blue or purple.

When you fill out the a downloaded Form 56 from IRS.GOV, the type will appear blue. This is OK.