

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

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| LEAVE BLANK | |
| JOB NO | <i>NCI-58-83-10</i> |
| DATE RECEIVED | <i>7-6-83</i> |
| NOTIFICATION TO AGENCY | |
| In accordance with the provisions of 44 U.S.C. 3303a the disposal request, including amendments, is approved except for items that may be stamped "disposal not approved" or "withdrawn" in column 10 | |
| <i>8-4-83</i> Date | <i>[Signature]</i> Archivist of the United States |

TO: **GENERAL SERVICES ADMINISTRATION,
NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON, DC 20408**

1. FROM (AGENCY OR ESTABLISHMENT)
Department of the Treasury

2. MAJOR SUBDIVISION
Internal Revenue Service

3. MINOR SUBDIVISION
Facilities Management Division

4. NAME OF PERSON WITH WHOM TO CONFER
Nancy R. Gloss

5. TEL EXT.
566-9711

6. CERTIFICATE OF AGENCY REPRESENTATIVE

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposal of the agency's records; that the records proposed for disposal in this Request of 2 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified.

A Request for immediate disposal.

B Request for disposal after a specified period of time or request for permanent retention.

| | | |
|---------------------------|---|---|
| C. DATE <i>6/27/83</i> | D. SIGNATURE OF AGENCY REPRESENTATIVE <i>[Signature]</i> | E. TITLE Section Manager Records and Reports Management Section |
|---------------------------|---|---|

| 7. ITEM NO. | 8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods) | 9. SAMPLE OR JOB NO. | 10. ACTION TAKEN |
|-------------|---|----------------------|---------------------------|
| 1. | <p>(i) The records described below are maintained in Internal Revenue Service Centers. The change affects IRS Records Control Schedule 206, Items 61 and 62. Note: this authority applies to RCS204/72, reinstated under NC/1/58/83/6, also.</p> <p>Estate Tax Returns. Includes related schedules, correspondence and documents such as wills, affidavits of appraisals, trust agreements, power of attorney, briefs, etc., and any related gift tax return filed by decedent.</p> <p>(1) Originals, reviewed and renumbered by Examination. (a) <u>Destroy</u> 75 years after end of processing year. (b) <u>Retire</u> to Federal Records Center 6 months after Examination closure, except for those estate tax returns which contain generation skipping transfers.</p> <p>(2) Generation-Skipping Tax Return (Form 706-B), Generation-Skipping Inf. Return (Form 706-B(1), and Generation-Skipping Ben. Return (Form 706-B(2)). (a) <u>Retain</u>.</p> | <i>JA 7/29/83</i> | Disposition not approved. |

Request for Records Disposition Authority - Continuation

JOB NO.

PAGE OF

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| 7. ITEM NO | 8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods) | 9. SAMPLE OR JOB NO | 10. ACTION TAKEN |
|---------------|---|---------------------------|---------------------------|
| 2. (62) | <p>(3) File Folders-set-up to house returns and related documents prior to examination and renumbered DLN. These folders should all be screened to remove any returns or correspondence that should be processed and forwarded to Examination. After screening, dispose as follows:</p> <p>(a) <u>Destroy</u> when related Estate Tax Returns are retired to the Federal Records Center in accordance with (1)(b) above.</p> <p>Gift Tax Returns. Form 709, United States Gift Tax Return; Form 710, Gift Tax Donee's or Trustee's Information Return of Gifts; Form 882, Statement of Gift Tax Due, and all related correspondence and documents not associated with Estate Tax Returns.</p> <p>(1) Gift Tax Returns for 1966 and following years.</p> <p>(a) <u>Retain</u>.</p> <p>(2) Inactive Gift Tax Returns for years 1916-1965.</p> <p>(a) <u>Destroy</u>.</p> <p>(3) File Folders - set-up to house returns and related documents prior to examination and renumbered DLN. These folders should all be screened to remove any returns or correspondence that should be processed and forwarded to Examination. After screening, dispose as follows:</p> <p>(a) Destroy when Gift Tax Returns are filed in the alpha file or retired to the Federal Records Center per item 61 above.</p> | | Disposition not approved. |