

TO

INFORMAL ESTATE ADMINISTRATION IN WISCONSIN



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Additional information is available at:

http://www.wripa.org/ https://www.wicourts.gov/services/public/selfhelp/probate.htm http://wilawlibrary.gov/topics/estate/probate.php

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Definitions

Administration: A court-supervised process to:

• Give notice to creditors and interested persons.

• Determine who the heirs and beneficiaries are.

Collect and inventory assets.

Determine and pay federal and state taxes.

Pay claims and administration expenses.

• Transfer assets of a decedent to heirs or to beneficiaries under a Will or Codicil.

Account for the disposition of assets that are collected.

Beneficiary: A person named in the *Will* or *Codicil* to receive an interest in property from a decedent; sometimes referred to as legatee.

Bequest and Devise: Used in a *Will* or *Codicil* to grant an interest in property.

<u>Codicil</u>: A written document made by the decedent that changes an existing *Will*. In Wisconsin a *Codicil* and a *Will*, to be validly executed, must be executed with the signature of two witnesses and the signature of the testator or someone under his or her direction.

<u>Deceased</u>: A person who has died.

Decedent: The person who has died whose estate is subject to administration.

<u>Domicile</u>: Is the place where a person has his or her fixed and permanent home or residence to which he or she intends to return after any absence. It is not a special or temporary residence but a home or residence intended to be permanent for an unlimited or indefinite period.

<u>Fair Market Value</u>: A property's full value is defined as its fair market value, or the amount the property will sell for in an arms-length transaction on the open market between a willing seller not obliged to sell the property and a willing buyer not obliged to purchase it.

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<u>Heir</u>: Any person, including a surviving spouse, who under state law is entitled under the statutes of intestate succession to an interest in property of the decedent.

Interested Person or Person Interested: Includes one or more of the following:

- Any heir of the decedent (even if not named in the Will or Codicil).
- Any beneficiary named in the *Will* or *Codicil*, and may include a beneficiary of a *trust*, the *trustee* of any existing *trust*, and a nominated *trustee* in the *Will* or *Codicil*.
- Personal Representative named in the Will.

<u>Intestate</u>: Not having made a valid *Will*. When a decedent has died "intestate," the distribution of assets follows the statutes of intestate succession.

Issue: "Issue" are children, grandchildren, great-grandchildren, and lineal descendants of more remote degrees, including those who occupy that relation by reason of adoption (under § 854.20, Wis. Stats.) and non-marital children and their lineal descendants (to the extent provided by § 852.05, Wis. Stats.).

Legal Description: A complete description of land recorded in a document filed with the register of deeds, such as occurs in a deed. Typically, this description is by lot number in a platted and recorded subdivision, or by "metes and bounds". A postal address is not a "*legal description*."

<u>Per Stirpes</u>: Property is divided into equal shares for the decedent's children, one share for each surviving child and one share for each deceased child; the deceased child's share is divided among the surviving *issue* of the deceased child (i.e. by right of representation).

<u>Personal Representative</u>: Any person authorized to administer a decedent's estate. Evidence of this authorization is found in Domiciliary Letters granted by the court or by the Probate Registrar. A personal representative may be nominated in a *Will* or *Codicil*.

Probate: Technically speaking, *probate* is the proof of the validity of a *Will* in court proceedings and the *probate* of the assets of a *decedent* involves the process of administering the assets as directed under the *Will.* However, *probate* or *probate* administration are terms often associated with administration of the property of persons who have died *intestate* (leaving no *Will*), as well as the

property of minors, persons determined to be incompetent, and persons unwilling or unable to manage their income or assets.

<u>Probate Registrar</u>: An officer of the court designated to perform the functions of the court in informal estate proceedings.

<u>Testate</u>: Having made a valid *Will*. When a decedent has died "testate," distribution of assets follow the *Will*.

<u>Testamentary Documents</u>: In addition to a Will and Codicil, any other governing document can be considered a testamentary document such as a marital property agreements.

<u>Testamentary Trust</u>: An arrangement outlined in a *Will* in which one party, appointed by the court as *trustee* (sometimes a bank), holds and distributes property for the benefit of another.

<u>Trustee</u>: A person who holds in trust the title or power over property.

<u>Will</u>: A document, properly executed prior to death, which directs distribution of property after death and nominates who will care for and distribute property. It may nominate someone to care for minor children and/or handle assets in a testamentary trust. In Wisconsin a *Codicil* and a *Will*, to be validly executed, must be executed with the signature of two witnesses and the signature of the testator or someone under his or her direction.

Frequently Asked Questions

What is the Purpose of this Booklet?

This booklet has been developed by the Wisconsin Register in Probate Association. It is NOT meant to provide legal advice; it is merely a guide that may help you through the estate administration process. We suggest that you review the terms under "Definitions" on page 3 before reading on.

Look for this check mark, it will give you tips on navigating the informal administration estate process.

What Types of Administration are there? Formal and Informal Administration

Formal Administration is the administration of the decedent's estate, intestate or testate, with exercise of continuous supervision by the Court. A Formal Administration requires the assistance of an attorney.

Informal Administration may be granted without an attorney's assistance. *Informal Administration* is the administration of the decedent's estate without continuous court supervision, and is supervised by a Probate Registrar.

It may be appropriate for you to consult with an attorney before attempting any of the types of estate administrations.

Summary Settlement

Summary Settlement is a type of estate administration designed to assist in settlement of small estates and does not require an attorney's assistance. Summary Settlement is available for estates having a value of \$50,000 or less, if the decedent had a surviving spouse/domestic partner or had surviving minor children.

Summary Settlement is also available if the value of the estate does not exceed certain costs, expenses, allowances and claims, regardless of whether there is a surviving spouse/domestic partner or minor children. The value of the estate is calculated by subtracting from the gross amount of assets any debts for which property of the estate is security.

Summary Assignment

Summary Assignment is a type of estate administration for estates of \$50,000 or less and was designed to assist in settlement of small estates that cannot be settled by a Summary Settlement.

Transfers of Property without Estate Administration

There is a method to transfer a decedent's assets without a court supervised administration, called "Transfer by Affidavit," for estates having a value of \$50,000 or less. The State Bar of Wisconsin maintains and updates this form and you can find the guide for the forms at PR-1831. The person who completes and uses this form has certain legal responsibilities and it may be appropriate to consult with an attorney before deciding whether you should use a "Transfer by Affidavit".

What is Informal Probate?

Informal probate is the administration of the decedent's estate, testate or intestate, without continuous supervision of the court. Informal Administration is started by filing an application with the Probate Registrar in the county where the decedent domiciled (i.e. resided) and/or where the decedent's assets are located if the person did not domicile in Wisconsin. The Probate Registrar will determine whether a Will is entitled to be probated and whether the application for Informal Administration should be granted or denied.

Common reasons for denial of an application for Informal Administration can include;

- The original Last Will and Testament of decedent cannot be found.
- Improper execution/attestation and or validity of decedent's Last Will and Testament.
- Unclear or impossible provisions in the decedent's Last Will and Testament.
- The decedent's Will prohibits Informal Administration.
- If decedent died without a Will and all heirs do not consent in writing to Informal Administration or the nominated personal representative.
- If an interested person/heir/beneficiary demands Formal Administration.

The denial of an application does not prevent the filing of a petition for Formal Administration by a person interested in the estate.

How Can I tell if Informal Probate is the Way to Go?

The choice of estate administration is a legal decision and court staff cannot provide this advice to you. Decisions about which estate administration procedure would be most appropriate are often affected by the presence or absence of interested persons who do not agree on what should be done,

tax issues, the size of the estate, claims, and the need to have a judge determine or decide issues such as disputed claims, the validity of a will, the meaning of the terms of a will, or who are the heirs.

You should determine if the decedent died testate (with a Last Will and Testament) or intestate (without a Will). You must make a diligent search for a Will and/or Codicil of the decedent. If, after a diligent search, you do not find a Will, it may be that the decedent has left no Will and any estate administration must be done intestate (without a Will).

If the decedent has not advised you where his or her original Will can be located, some places to search might include a safe deposit box in the decedent's bank; the safe, or firebox at the decedent's home, or wherever the decedent kept his or her other important papers. Sometimes the original Will may be found in the Office of Register in Probate where a decedent deposited it for "safekeeping" before his or her death. Not all counties, however, allow such deposits for "safekeeping." Sometimes, the original Will may be in the possession of the attorney who drafted it. There may also be an original Codicil or Codicils that modify the Will.

Make a list of the heirs under the statutes, see <u>Intestate Succession Chart</u>. Then, if there is a Will (including any Codicils), make a list of the beneficiaries (those named in the Will and Codicils).

Make a list of all assets in which the decedent had an interest. Include real estate and all personal property (i.e. cash, CD's, stocks, bonds, vehicles, machinery, promissory notes, etc.). The list should include the estimated value of each asset and how each asset is owned (i.e. solely, jointly, marital, payable at death, etc.). If you are not able to obtain all this information because the assets are solely owned, just make the best list you can for now; the exact details can be resolved later.

You are now ready to determine the type of estate administration procedure required to settle the final affairs of the decedent. Choosing the right procedure is very important. You are encouraged to discuss the decedent's Will, the working relationship among the heirs and/or beneficiaries and the decedent's asset situation, as determined above, with an attorney.

If it appears that informal estate administration is the preferred procedure, read on.

Where can an Application for Informal Estate Administration be Filed?

An application for informal estate administration is to be filed in the county where the decedent was "domiciled" (i.e. resides) at the time of his or her death. However, if the decedent had no domicile in Wisconsin, an application for informal estate administration may be filed in any county in Wisconsin where property of the decedent is located.

Do I need an Attorney for Informal Estate Administration?

Wisconsin statutes do not require you to hire an attorney to assist with an informal estate administration, however you may seek the advice or services of an attorney at any point during the process. During the estate administration process, a demand for formal proceedings may be filed with the court, at which time, the services of an attorney may be necessary.

It is important for you to remember that most Probate Registrars are not attorneys. Even if your local Registrar is an attorney, statutes prohibit Registrars from giving legal advice. A Registrar's role is to advise a personal representative, within the Registrar's competence, in the preparation of any of the documents required to be filed with the court in an informal estate administration. Think of this as giving advice as to how the various forms should be completed, not giving advice as to how you should proceed in any area. This guide is an attempt to assist the Registrar in giving a personal representative the required document preparation direction.

How Do I Start an Informal Estate Administration?

All forms are available on-line and can be found at: www.wicourts.gov.

You may file your documents by using one of these three methods:

- Fill the forms in on-line as a Word document and then print; or
- · Print the forms and complete by hand in ink; or
- You may also take advantage of the Wisconsin Court System's electronic filing options and eFile your probate paperwork at https://www.wicourts.gov/ecourts/efilecircuit/index.jsp.
- Follow the instructions to register for an e account.
- Create an eFiling account, pay the appropriate fee and electronically file your paperwork.

The following forms are required to initiate an informal proceeding: The following startup forms are always required:

- Application for Informal Administration (<u>PR-1801</u>)
- Proof of Heirship (<u>PR-1806</u>)
- Consent to Serve (<u>PR-1807</u>)
 (Signed by nominated personal representative and may include Appointment/Acceptance of Resident Agent.)
- Statement of Informal Administration (PR-1808)
- Domiciliary Letters (PR-1810)

If you have obtained the signatures of all interested persons on the Waiver and Consent form, the following forms are also required:

- Waiver and Consent (Informal Administration) (PR-1803)
- Notice to Creditors (PR-1804)

If you have <u>not</u> obtained the signature of all the interested persons on the Waiver and Consent form, you will be required to complete this form instead:

Notice Setting Time to Hear Application and Deadline for Filing Claims (Informal Administration)
 (PR-1805)





The Probate Registrar may require the following documents, depending on local practice and who the heirs/beneficiaries are:

- Signature Bond in Estate or Trust Proceedings (PR-1809A)
- Surety Bond (obtained from an insurance agent) and the Court Approval of Signature Bond in Estate or Trust Proceedings (PR-1809B)
- Affidavit of Service (Probate) (PR-1817)
- Consent to Serve as Trustee (<u>PR-1930</u>) (signed by nominated trustee may include Appointment/Acceptance of Resident Agent)
- Letters of Trust (Informal and Formal Administration) (PR-1931)
- Declination to Serve or Resignation (Informal and Formal Administration) (PR-1802)
- Order Appointing Guardian Ad Litem or Attorney (GF-131A)
- Consent to Act (GF-131B)
- Petition to Dispense with Guardian ad Litem (Informal and Formal Administration) (PR-1820)
- Order Dispensing with Guardian ad Litem (Informal and Formal Administration) (PR-1821)

Don't forget to deliver the original Will, Codicil, Marital Property Agreement, or any other testamentary documents either in person or by mail.

You are now ready to apply for informal estate administration. It is always advisable (and in some counties required) that you set an appointment to see the Probate Registrar or a designated staff member when you are ready to file the above documents.

How Do I Complete the Informal Estate Administration?

The following documents are required to be filed in an informal estate administration:

- Affidavit or Proof of Publication (Provided by the newspaper once publication has been paid.)
- Inventory (Informal and Formal Administration) (<u>PR-1811</u>) (A statutory filing fee must accompany this form.)
- Affidavit of Service (Probate) (PR-1817) (of Inventory to Heirs/Beneficiaries)
- Estate Receipt (Informal and Formal Administration) (<u>PR-1815</u>)(Signed by heirs/beneficiaries and claimants.)
- Statement of Personal Representative to Close Estate (Informal Administration)(PR-1816)

The Probate Registrar may require the following documents depending on local practice and/or the particulars of the estate you are administering:

- Estate Account (Informal and Formal Administration) (PR-1814)
- Affidavit of Service (Probate) (PR-1817) (of final Estate Account to Heirs/Beneficiaries)
- Notice of Distribution to Ward (Informal and Formal Administration) (<u>PR-1822</u>) (To notify the court
 appointing a guardian of the estate of the total property to be distributed to the guardian of the
 estate for the benefit of the guardian's ward at least ten days prior to the distribution.)
- Closing Certificate for Fiduciaries (Obtained by filing a <u>Schedule CC</u> form with the Wisconsin Department of Revenue)
- · Receipt for Perpetual Care or Funeral Receipt
- Proof of Recording of Documents Transferring Real Estate (PR-1914)
- Statement of Transfer of Interest in Property (Informal Administration) (PR-1828)
- Statement of Termination and Confirmation of Interest(s) in Property (Informal Administration)
 (PR-1827)

Can You Give Me Some Practical Suggestions?

Notice to Creditors/Interested Persons

- It is your responsibility to take the Notice to Creditors or Notice Setting Time to Hear Application and Deadline for Filing Claims (Informal Administration) to the newspaper for publication.
- It is also your responsibility to mail a copy of the Notice(s) to all known creditors of the decedent.
- When you pay the bill for the publication, the newspaper will provide you with an Affidavit or Proof
 of Publication. File the Affidavit or Proof of Publication with the Court.
- It is your responsibility to mail a copy of the Notice Setting Time to Hear Application, Application for Informal Administration and a copy of the Will and Codicil to all interested persons.
- An Affidavit of Service (PR-1817) provides evidence for the file that documents were sent to the persons and/or businesses whose names and addresses are shown.
- If a hearing on notice is required, the Personal Representative will be appointed after the hearing once the following documents are filed:
- Affidavit of Publication from newspaper;
- Form PR-1817 Affidavit of Service showing proof Notice was mailed to all interested persons.
- Bond, if required. Determination will be made by the Probate Registrar whether bond will be a signature bond (Form PR-1809A) or a surety bond.

Claims filed by Creditors

- If a claim is paid/satisfied by you, the creditor must provide an Estate Receipt (PR-1815)
 acknowledging complete satisfaction or settlement of the claim.
- If you dispute the claim, you will be required to demand "formal administration" to have a judge decide the dispute.
- You must be represented by an attorney in proceedings before a judge. For this reason it is wise
 to seek the assistance of an attorney as soon as you determine that a claim should be
 disallowed.
- If a claim has been served on you or mailed to you, your objection, offset or counterclaim must be served upon or mailed to the claimant and filed with the court within 60 days of when the claim was mailed to or served upon you as personal representative.

Inventory

- As you gather the decedent's assets in preparation for filing the Inventory form, think of the
 Inventory as a snapshot of the fair market value of all assets owned by the decedent on the date
 of death.
- The Inventory is an important legal document that establishes the fair market value of assets on date of death and incorrect valuations can have a significant impact on the personal representative and distributees of the assets listed in the Inventory.
- Income tax basis problems and disputes about proportionate distribution of assets are examples of issues that may arise from improper valuation.
 - Although you are not required to hire a qualified and disinterested appraiser to assist you
 in determining the value of assets, you should consider whether you have sufficient skills
 to appraise inventoried assets on your own.
 - You may also wish to consult with a tax advisor or attorney before filing your Inventory.
 - o Provide a copy of the Inventory to all interested persons and file an Affidavit of Service

Final Account

- You should prepare a final Estate Account and furnish copies to all heirs/beneficiaries.
- Think of the final Estate Account as a record of what came into the estate and what went out of the estate between the date of death and the completion of the estate.
- This form should be completed only after you have paid all the decedent's outstanding bills, including the funeral bill, costs of administration of the estate, any proper claims and all applicable taxes.
- Any additional property listed in Schedule A of the Estate
 Account is subject to an additional .2% filing fee.

Deadlines

- The Inventory must be filed or exhibited no later than the date set in the Notice of Estate Administration Deadlines
- An estate can be closed any time after the final date to file
 claims has passed and should be closed within 12 months of the date the estate was opened.
- The deadlines are set in the Notice of Estate Administration Deadlines which is issued to the Personal Representative upon appointment.
- An extension of time may be granted by the Probate Registrar. You must complete the Petition for Extension of Time (<u>PR-1833</u>) and Order for Extension of Time (<u>PR-1834</u>) and file these forms with the Probate Registrar to consider.
- Failure to meet any deadline established by the Probate Registrar will result in the personal representative being required to appear in court to show cause as to why the personal representative should not be removed or other sanctions imposed.
- The Statement of Personal Representative to Close Estate is normally the final document filed in an estate, but it does not mean that you are done. If, six months after filing the statement, no other proceedings are pending in the court, your appointment as personal representative terminates.

or transferring an interest in real estate, you will be required to sign a deed or transfer document with the proper legal description (not a postal address). You may wish to have an attorney prepare this important legal document, as mistakes in the legal description can affect ownership interest in the property.

Wisconsin Statutes

- You may need to review the statutes during this process.
- Check your law library at your local courthouse, public library, the Wisconsin State Law Library
 (http://wilawlibrary.gov/) or the Wisconsin State Legislature
 (http://docs.legis.wisconsin.gov/statutes).

Within the scope that has been discussed earlier in this booklet, your local Probate Registrar is here to see you through the informal estate administration process. We hope this booklet is helpful and we welcome your comments on ways that we may improve it to better assist others in the future.

What Should I Know About Being a Personal Representative?

A statement in a Will about who should serve as personal representative does not automatically allow you to start performing the duties of a personal representative; the statement in the Will is simply a nomination by the decedent. The Probate Registrar or Judge must appoint you <u>before</u> you assume the duties of a personal representative. The document that shows others you are appointed as Personal Representative is called "Domiciliary Letters." For a nominal statutory fee, the Probate Registrar will supply you as many certified copies of this document as you feel you will need at any time throughout the estate administration process.

Serving as personal representative is a very important job. You may be required to post a bond to protect the assets in the estate. You must keep all interested persons informed of the status of the estate proceedings and complete the estate in a timely fashion. The Probate Registrar will send you a Notice of Estate Administration Deadlines showing the Inventory due date and the date by which the estate is to be closed.

For all practical purposes, a personal representative is acting in place of the decedent. You are expected to handle the assets of the decedent just as any prudent person would handle his or her own assets.

Your duties will include taking possession (marshaling) of all the decedent's assets and filing an Inventory with the date of death values of all assets you have in your control. You may need to open a checking account to assist you with keeping accurate records of income and expenses. The Probate Registrar cannot require that you use a checking account, nor is it always needed.

You will give notice to creditors and may give notice to interested persons by publication in the newspaper. Your Registrar can identify which papers are eligible for publication. Notice must also be given to

Applying for an Employer Identification Number (EIN) is a free service offered by the Internal Revenue Service. Beware of websites on the Internet that charge for this free service.

interested persons by mail or personal service if Waiver and Consent forms cannot be obtained.

You may be converting assets to cash, selling real estate, running a business, insuring and keeping property in good repair.

You will collect any income due to the decedent like interest, dividends, rent, etc. You will pay bills, settle proper claims or object to claims that are not appropriate.

You must file a Closing Certificate for Fiduciaries. This document is obtained by preparing and filing a Schedule CC, Request for a Closing Certificate for Fiduciaries, with the Wisconsin Department of Revenue. See link for the Wisconsin Department of Revenue at the end of this booklet. There may be additional final and fiduciary tax returns to complete. You are encouraged to utilize the services of a competent tax preparer or an attorney to help you with this aspect of the estate.

You must prepare a final Estate Account, showing all money and assets that came into the estate between date of death and distribution, and all money and assets that were paid out of the estate. You may be required to file the Estate Account with the Probate Registrar. To prepare an Estate Account, you must keep accurate records. There are many ways to keep records. An inexpensive method is to prepare a ring binder or spiral notebook for "scheduling" your financial activities, such as receiving

assets, paying bills or making distributions. A sample "scheduling" page can be found on <u>at the end of this booklet</u>. If you make entries in your notebook or ring binders as these activities occur, there is less chance that you will make mistakes in your accounting and it will take less time to complete your Estate Account. It will also be easier for someone to help you complete your accounting if you have kept accurate records.

You will distribute assets according to the Will and/or statutes and secure receipts from those receiving assets.

Finally, you will file a Statement of Personal
Representative to Close Estate. If no proceedings
challenging your Statement or otherwise involving you as
personal representative are pending in the court six
months after your Statement is filed, your appointment as
personal representative terminates.

As personal representative, you may obtain a discharge from personal liability for federal tax deficiencies by preparing and filing Form 5495 with the Internal Revenue Service. A link to obtain Form 5495 is included in this Guide at the end of this book. Please note that the discharge from personal liability applies only for tax returns that have been filed and are listed in your Form 5495 or filed with it.

How do I Complete the Required Forms?

On the following pages you will find samples of the "usual" informal administration forms you will need to complete. A brief explanation appears just prior to each "Sample" form.

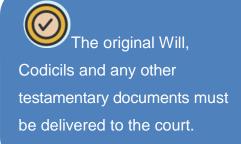
As personal representative, you are responsible for paying any taxes that are owed by the estate or the decedent, from the estate assets. These include the decedent's gift and income taxes, as well as the income and estate taxes owed by the estate. You may incur personal liability for these taxes if they are owed and not paid from available estate assets. You should consult with an attorney or tax advisor about these issues if you have questions about potential tax liabilities of the decedent or the estate. You should investigate whether all potential taxes owed by the decedent were paid. A starting point would be for you or your advisor to review prior tax returns of the decedent, as well as any actions of the decedent that could give rise to income or gift tax liability.

Wisconsin requires that you use the mandatory probate forms you see in this booklet. Forms may be available for purchase from your Probate Registrar. You may also access the most up-to-date forms on the Internet at the State of Wisconsin Supreme Court <u>website</u>. The forms are available at no cost in Word or PDF format to complete online or on your electronic device.

You may also take advantage of the Wisconsin Court System's electronic filing options and eFile your probate paperwork at

https://www.wicourts.gov/ecourts/efilecircuit/index.jsp.

- Follow the instructions to register for an e account.
- Create an eFiling account, pay the appropriate fee and electronically file your paperwork.



Remember, the Probate Registrar cannot fill out the forms for you unless you have a qualified disability under the American with Disability Act. The Probate Registrar is, however, required by statute to check the data you provide and, if necessary, request further information from you or to file an amended document.

Intestate Succession Chart

If there is no will, the decedent's heirs receive the property. Wisconsin Law defines who the heir is when there is no will. Wis. Stats §852.01. To determine the heirs use this flow chart.

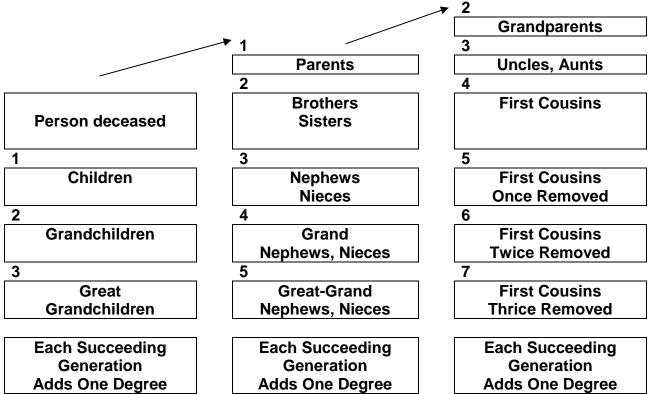
For this chart, if there is a surviving domestic partner, that person takes the place of the surviving spouse.

Who are the heirs? -If no surviving spouse, then decedent's issue receive the estate divided per stirpes.* -If no issue, then decedent's parents are the heirs, each receiving one half of Is there a the estate. surviving No --If no surviving parent, then the decedent's siblings and their issue take per spouse? stirpes.* -If no siblings or siblings' issue survive, then one half the estate goes to the maternal grandparents or their surviving issue per stirpes* AND one half goes to the paternal grandparents or their surviving issue per stirpes*. Yes -If no heirs on one side, then all to remaining side. -If no surviving issue of grandparents on either side, estate escheats to State of Wisconsin. Does the deceased have issue? If no surviving issue, then spouse No receives the entire estate. Yes Are all of The spouse receives one-half of decedent's property other than the following decedents' surviving issue a. The decedent's interest in marital property. Noalso the issue of b. The decedent's interest in property held equally and exclusively with the the surviving surviving spouse as tenants in common. spouse? All of decendent's issue, including those that are issue of the surviving spouse, receive, per stirpes*, the portion of the estate not passing to the surviving Yes spouse. Result: When considering the spouse's ownership of one half of the marital property and tenancy in common property, this results in a 50/50 split between Spouse receives the issue and the spouse. entire estate.

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Per Stirpes: Property is divided at each generation, one share for each surviving person and one share for each deceased person; any deceased person's share is divided among that person's issue in the same way. (Also referred to as by right of representation). So if 3 children, the portion going to decedent's children is divided into thirds. Then if one of the children is also deceased and had 2 children, that share is divided equally between the two grandchildren. If one of those grandchildren is deceased then between their issue, but if none, that share goes to the others surviving in that generation.

See Wis. Stats. §§ 990.001(16) Degrees of Kinship.



Forms

Please type or print in black ink legibly when filling out your forms, as it will make it easier for you to make copies for filing and notice to interested persons. Please retain the originals in a safe place, as you may be required to produce them at a later date.

The Probate Registrar cannot fill out the forms for you unless you have a qualified disability under the American with Disability Act. The Probate Registrar is, however, required by statute to review the information you provide and, if necessary, request further information from you or to file an amended document.

Any form that requires notarization of your signature must be notarized. Remember to wait to sign the document; a notary must see you actually sign the form. You may be required to produce identification. If you are not going to come to your local Office of Register in Probate to sign the form, you can usually find a notary public at your bank. If you live in another state, you may use a local notary.



Important Information about these Sample Forms

The following sample forms are completed as if the decedent had a valid Will. The decedent is single.

This hypothetical Will provides for specific bequests to individuals and an equal sharing (25% each) of remaining (residual) estate. The specific bequests are as follows:

- Mary Smith, individually: the antique duck decoy collection, all personal property
- Susan Brown, individually: Fishing Equipment and tackle and Tundra long range hunting rifle.
- Mary Smith, as trustee of the Trust for the Benefit of John Miller: 250 shares of AT&T stock.

The hypothetical Will provides for any dividends paid before distribution of the specific bequests to be considered income earned by the estate (not the beneficiary) and that distributions of property shall be at the values listed in the personal representative's Inventory and not current values at time of distributions.

If you are administering an estate with a Will, distributions must follow the directions of the Will. It is recommended that you obtain appropriate tax or legal advice if you will be attempting to distribute proportionate shares of non-cash assets and if family members want to make alternative arrangements.

There are special considerations for married persons due to marital property rules in Wisconsin. We have provided an example of an inventory to show martial property designations.

Checklist for Opening an Informal Estate Administration				
	Application for Informal Administration (PR-1801)			
	Proof of Heirship (PR-1806)			
	Original Will (and Codicils, if any)			
	Waiver and Consent (Informal Administration) (PR-1803)			
	Consent to Serve (PR-1807)			
	Statement of Informal Administration (PR-1808)			
	Signature Bond in Estate or Trust Proceedings (PR-1809A) OR			
	Surety Bond (if required)			
	Domiciliary Letters (PR-1810)			
	Notice to Creditors (PR-1804) OR			
	Notice Setting Time to Hear Application and Deadline for Filing Claims (PR-1805)			
	Notice Concerning Fiduciary Relationship (<u>IRS Form 56</u>)			
	Declination to Serve or Resignation (if necessary) (PR-1802)			
	Order Appointing Guardian ad Litem or Attorney (if required) (GF-131A)			
	Consent to Serve as Trustee (if necessary) (PR-1930)			
	Letters of Trust (if necessary) (PR-1931)			



Do not include confidential information on the document(s) such as;

- Social security numbers,
- Employer or tax ID numbers,
- Driver license numbers,
- Financial accounts numbers, and passport numbers.

If you must include this type of information use the Confidential Disclosure of Protected Information form <u>GF-241</u>.

Application for Informal Administration

Form No.: PR-1801

<u>Purpose of Form</u>: To apply to the Court for informal administration of an estate.

Directions:

PAGE 1.

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number.

Question #1

Insert the decedents:

- a) Date of birth
- b) Date of death
- c) County and state in which he/she was domiciled
- d) Post office address

Question #2

You must indicate in what way you are an "interested person" in the estate. Are you an heir, a beneficiary under a Will or Codicil, nominated as a Personal Representative in the Will or Codicil, or a nominated Trustee or trust beneficiary, etc.?

Question #3

Check the appropriate box to indicate whether there is another estate open for this decedent. If you check ARE, enter in the explain area which county and state the other probate is being administered.

Question #4

You must insert an "estimate" of the total gross value of decedent's assets that are subject to this estate proceeding. This amount is not binding on you or anyone else; it is just an estimate.

Question #5

Check the appropriate boxes concerning assistance programs from which the decedent may have received aid. If you are uncertain, check the box to indicate you lack information concerning aid.

Question #6

This question must be answered. Indicate the name of the spouse, whether deceased or previously divorced, and check the appropriate boxes concerning benefits. If you are uncertain, check the box to indicate you lack information concerning aid. If there was more than one spouse, check the box and attach a separate page with the name and other appropriate information.

Question #7

If the decedent had a Will or Codicil, include that information at this time. Also indicate the name of the person nominated in the decedent's Will as the Personal Representative or Executor. If more than one person has been nominated as "Co-Personal Representative," include the name for each party.

If any person nominated as Personal Representative is now deceased, include his or her name and date of death. Also indicate the name of the alternate personal representative.

If the Will establishes a Testamentary Trust to be administered by a Trustee, insert the name of the person nominated as Trustee.

PAGE 2.

Question #8

If you have made a diligent inquiry and are convinced that the decedent left no Will, then check this box.

Question #9

Insert the name, relationship (what makes the person "interested"), and address of each "interested person".

Refer to the "definitions" section regarding who is an "interested person." Make sure that you list the names of all the "interested persons." If there are minors, include their dates of birth. If an interested person has been found by a court to be incompetent, include the name and address of his or her guardian.

If there is an existing trust (not the Testamentary Trust established in the Will) that is named as a beneficiary under the Will, insert the name of the trustee for that trust and the trustee's address.

If the Will provides for a Testamentary Trust and Trustee, you must also include the name and address of the Trustee as an interested person and prepare a Consent to Serve (by Trustee) and Letters of Trust that must be issued at the same time as the Domiciliary Letters.

Question #10

Any special fact requiring court action, you may insert here.

Below the words: "I request:" check all boxes that apply and indicate what you are asking the Probate Registrar to do.

On the lines provided, type the name, address, email address and telephone number of the person who is applying to open this proceeding. If the applicant is a lawyer, include the state bar number.

Complete the "Form Completed by" box in the lower left corner of the form. This needs to be done on all forms submitted to the court.

The applicant must sign this form in front of a Notary Public. The Probate Registrar may instruct you to wait and sign the form at the time you bring it back to the office to open the estate. In that case, the Registrar will notarize your signature.

STATE	OF WISCONSIN, CIRCUIT COURT, Decedent's C	County COUNTY	SAMPLE
IN THE	MATTER OF THE ESTATE OF	☐ Amended	
WILLIA Name	AM ELLIOTT	Application for Informal Administration	
AKA B	ill Elliott	Case No	
UNDE	R OATH, I STATE:		
1.	The decedent, with date of birth December 30, 1940 Decedents' County County, State of Wisconsin WI 51111.		
2.	I am interested as an heir) (nominated personal repres	entative/trustee) (beneficiary)	
3.	Other proceedings concerning the estate of the decelsewhere. Explain:		ing in this state or
4.	The estimated net value of decedent's property req	uiring administration is \$250,000	
5.	The decedent did did not receive Medical Assistance/Medical Assistanc	ership benefits (through a Managed Canity Options Program (COP). Chronic Disease Program. County hospital or institution, or respons	
6.	If the decedent was ever married, complete the foll Name of spouse (☐ living or ☒deceased) Sally E☐ Married to decedent ☐ Divorced from decedent ☐ The spouse ☐ did ☐ did not receive beneft☐ I lack information to complete this section.	ent at time of decedent's death. its from the Community Options Progr	ram (COP).
(Comp	lete question 7 <u>OR</u> 8 below, whichever is applica	nble.)	
⊠ 7.	I believe these documents were executed properly	dated	luiry and am unaware of
	any revocation by decedent. The original will, including any codicil(s), is in the possession of the court. accompanies this application. was probated elsewhere and an authenticate is en route to the court by mail or personal definition. The personal representative(s) named by the decendame(s) Albert Elliott, who has declined to act, Mary Standamer I nominate Mary Smith The trustee(s) named by the decedent in the will are	elivery (for eFilers only). dent in the will and/or any codicil is smith, alternate to serve as per	
	Name(s) Mary Smith		

	I nominate Mary S	Smith		to serve as trustee	e(s).
□ 8.	B. I made diligent inquiry and am unaware of any unrevoked will of the decedent and believe that the decedent died leaving no will.				
	I nominate			to serve as person	al representative(s).
9.	The names and mailing addresses of all interests (For any person with disabilities, also list any guardian of esta any minor, list date of birth.)			·	y or attorney in fact; and for See attached
	Name	R	elationship Beneficiary, Fiduciary]	Mailing Address [Street, City, State, Zip]	If Minor, Date of Birth
	Mary Smith	Heir, Be Nominat	neficiary, ted Personal ntative & Trustee	555 Blank Street, Someplace, WI 51111	Date of Birth
	John Miller	Heir, Be Benefici	neficiary, Trust	100 First Street, Someplace, WI 51111	June 1, 2019
	Susan Brown Jane Jones Jacob Jones	Heir, Be Heir, Be	neficiary neficiary n of Estate of Jane	100 Second Street, Someplace, WI 51111 100 Third Street, Someplace, WI 51111 100 Third Street, Someplace, WI 51111	
□ 10.	Other:				
I REQI					
1.	A statement of in	formal admin	istration be issued		
⊠2.	The will, including	g any codicil(s), be admitted to i	nformal administration.	
3.	Domiciliary letters	s be issued to	Mary Smith		
⊠4.				ll of William Elliott for the Benefit of John	Miller
	Letters of trust be for the following t				
□ 5.	Other:				
County	f of			Applicant	
Subscri	bed and sworn to be	fore me on		Mary Smith Name Printed or Ty	ped
	Notary	Public/Court Officia	al	555 Blank St., Someplace, WI 51111 Address	
Name Printed or Typed				M.Smith.Address@email.com Email Address	(715) 999-9999
-	nmission/term expires notarial act involved the			<u>May 24, 2022</u>	Telephone Number
			0 ,	Date	State Bar No. (if any)

PR-1801, 05/20 Application for Informal Administration \$\\$851.21, 856.09, 865.06 and 879.01, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

Form completed by: (Name) Mary Smith			
Address 555 Blank Street, Someplace, WI 51111			
Email Address			
M.Smith.Address.email.com			
Telephone Number	State Bar Number (if any)		

PR-1801, 05/20 Application for Informal Administration §§851.21, 856.09, 865.06 and 879.01, Wisconsin Statutes This form shall not be modified. It may be supplemented with additional material.

Page 29 of 3

Proof of Heirship (Informal and Formal Administration)

Form No.: PR-1806

<u>Purpose of Form:</u> To document, under oath, the person(s) who are the heirs of the decedent.

To be completed by an individual with knowledge of the decedent's heirs.

Directions:

PAGE 1.

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number.

Question #1

Fill in your name, address and relationship to the decedent.

Question #2

Check the appropriate box.

If the decedent was survived by a spouse or domestic partner, fill in the name of that person.

Question #3

Under 3A, check the appropriate box. If the decedent had children, list the names of all children. If any child is deceased, indicate the date of death.

Under 3B, for each deceased child, list the name(s) of his or her children. If any of those children are deceased, indicate the date of death.

Question #4

Indicate whether all of the decedent's children are also the children of any surviving spouse or domestic partner. If the answer to this question is "no," then provide details.

Instructions: If there are living persons named in questions 2 through 4 on page 1, then go to question number 8.

If there are no living persons named in questions 2 through 4, then go to question number 5.

Question #5

Check the appropriate box; if the answer was "yes," then fill in the name of the parent(s).

PAGE 2.

Question #6

Under 6A, check the appropriate box; if the answer was "yes," fill in the name(s) of the living and deceased brothers or sisters and indicate the date of death if deceased.

Under 6B, list the name of each deceased brother or sister as noted in 6a and also list the names of his or her children. If any of those children are deceased, indicate the date of death and the names of his or her children.

Question #7

Read the information on the form and fill in any names if applicable.

Question #8

Must be answered.

The person signing must sign and date the form in front of a Notary Public.

Fill in the "Form completed by" box.

This form must be sent to or served upon all interested persons by you, the petitioner.

STAT	E OF V	VISCONSIN, CIRCUIT (COURT, <u>Decedent'</u>	s County	COUNTY	S	AMPLE
IN THE MATTER OF THE ESTATE OF An			☐ Ame	nded			
WILLIAM ELLIOTT			Proof of H	lairchin			
Name				☐ Informal Adm	•		
AKA I	Bill Ellic	ott		☐ Formal Admir			
				_			
				Case No.			
		H, I ANSWER THE FO					
1.	What	is your name, mailing a	ddress and relations	•		Dalatianah	:. <u>.</u>
	Mary	Name Smith	555 Blank Street Sc	Mailing Address omeplace, WI 51111		Relationsh Daughter	ıp
	iviary ,	Sintii	333 Blank Street, Se	mepiace, wi 31111		Daughter	
2.		he decedent survived b 'ES, give name:		-		☐ Yes	☑ No
3.		Did the decedent have If YES, list all names.	any children? (Living	g or deceased; natural or a	dopted.)	⊠ Yes □	No ched
			of Decedent's Chil		If Decea	sed, Date of Deatl	
		Mary Smith					
		Joan Miller Susan Brown			December 1, 2016	5	
		Jane Jones					
	В.	For each deceased ch deceased; natural or adopte and the names of his c	d). If any of his or h	er children are decea	sed, indicate the		t child
		Name of Decease		Name of Decease			
		Joan Miller		John Miller	·		
4.	4. If there is a surviving spouse or domestic partner, are all of the decedent's children listed in 3A., also the children of the surviving spouse or domestic partner? ☐ Yes ☐ No If NO, give details:					_	
	Instructions:						
	Are there living persons listed in answers to questions 2. through 4.? • If Yes, skip to question 8. • If No, continue with question 5.						
5.		e decedent leave surviv 'ES, list names.	ring parents?			☐ Yes ☐] No
				Name(s)			

_	If YES, list all names. (If deceased, indicate date of death.)				□ No □ Yes	
	Name	of Decedent's Brothers	or Sisters	If	Deceased,	Date of Death
В.	For each deceased brot	her or sister listed in 6A., I	ist his or her name and t	the name	ames of his or her children	
		r adopted). If any of his or h				
		nis or her descendants. (Li				See attached
	erilia aria trie riarries or i	iis of their descendants. (El	Virig or deceased, flatural or at		Name of De	
	Name of Deceased I	Brother or Sister in (6A)	Date of Death			
		` '		Brotne	ers or Siste	er's Children
grand	sparents and the descer se continue listing childre	s listed in questions 2. thro dants of any deceased grant en of deceased persons un	andparent and whether t ntil a living person is nan	the perso ned.	n is living or	
	MATERNAL	. (Wotner)		IERNAL	. (Father)	
Gran	dfather:		Grandfather:			
Gran	dmother:		Grandmother:			
Desc	endants:		Descendants:			
8. Did any of the persons named in #2 through #7 die wit If YES, list name(s), date of death and descendant(5).		⊠ No	☐ Yes
	Nan	ne	Date of Dea	th	Des	cendant(s)
State of			>			
County of				Signatur	re	
Subscribed ar	nd sworn to before me on _		Mary Smith			
			Name Printed or Typed			
	Notary Public/Court (555 Blank St., Someplace	e, WI 5111 Address		
	Name Printed or Ty	ped	M.Smith.Address@email	.com	(715)	999-9999
			Email Address			one Number
☐ This notarial	act involved the use of comm	unication technology	May 24, 2022			
		uniodion toormology.	Date		State E	Bar No. (if any)
Form completed by Mary Smith	y: (Name)					
Address						
	eet, Someplace, WI 51111					
555 Blank Str						
555 Blank Str Email Address M.Smith.Adre	ess@email.com					
555 Blank Str	ess@email.com	Bar Number (If any)				

Waiver and Consent (Informal Administration)

Form No.: PR-1803

<u>Purpose of Form:</u> To obtain consent of interested persons to use informal administration and appoint the proposed personal representative. Also waives notice requirements for a hearing to open the estate. A waiver and consent form is required from each interested person in the estate before Domiciliary Letters can be issued to the Personal Representative. If the waiver and consent cannot

be obtained and there is a Will nominating a personal representative willing to act, a hearing before the Probate Registrar will be required to open the estate.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Check the appropriate boxes on Line 5 and insert the dates, as applicable.
- If there is a Will, check the box on Line 6 and insert the date of the Will and date of any Codicil to the Will.
- In line 7 insert the name of the person seeking to be appointed as Personal Representative.
- The name of each interested person or beneficiary must be printed or typed in the box for this purpose and each must sign and date the form.
- Verification of any person's authority to act on behalf of another, i.e.: guardian, agent, etc., must accompany the Waiver and Consent.
- More than one interested person may sign on one form

Fill in the "Form completed by" box.

If there is no Will, informal administration will be permitted only if <u>all</u> interested persons request or consent in writing to informal administration and the appointment of the same person as personal representative. Any disagreement requires the use of formal probate, which requires hiring an attorney.

5	STATE OF WISCONSIN, CIRCUIT	COURT, DECEDE	ENT'S COUNTY COUNT	Y SAMPLE	
IN THE MATTER OF THE ESTATE OF			Amended		
	AM ELLIOT		Waiver and Consent		
Name	NIII TIII	(1 :	nformal Administration	n)	
<u>AKA I</u>	Bill Elliot		Case No.		
1.	I am by law an interested pe	erson in this esta	ate.		
2.	I am not a minor.				
3.	I have not been found incor	npetent and I do	not have a guardian.		
4.	I waive any further notice of the hearing on the application for informal administration. I enter my appearance in this matter, and consent to the requests made in the application for informal administration.				
5.	I have received a list of all in \boxtimes a copy of the will dated \subseteq			(if any), dated	
		or codic	bequest contained in th		
	decedent died leaving no	o will.			
⊠ 6.	I consent to the admission of codicil(s) (if any), dated	· · · · · · · · · · · · · · · · · · ·		and	
7.	I consent to the appointmenthis estate.	nt of Mary Smith	as perso	nal representative(s) in	
8.	Other:				
	>		•		
	Signature		-	Signature	
	Mary Smith, individually and as non Name Printed or Typ		John Miller, by his Guardian Name F	Ad Litem, George Johnson Printed or Typed	
	555 Blank Street, Someplace, WI 51	111	200 First Street, Someplace, WI 51111		
	Address	715 000 0000		Address 715 000 1224	
	M.Smith.Address@email.com Email Address	715-999-9999 Telephone Number	G.Johnson@email.com Email Address	715-999-1234 Telephone Number	
	Date	State Bar No. (if any)	Date	State Bar No. (if any)	
	>		>		
Signature Signature Susan Brown Jane Jones by her Guardian of the Estat Name Printed or Typed Name Printed or Typed			•		
400 Second Street, Someplace, WI 51111 100 Third Street, Someplace, WI 51111			, WI 51111		
	Address	715 000 7777	Innah Inna Garati	Address 715,000,000	
	S.Brown@email.com Email Address	715-999-7777 Telephone Number	Jacob.Jones@email.com Email Address	715-999-6666 Telephone Number	

Date

State Bar No. (if any)

State Bar No. (if any)

Date

•			
	Signature		Signature
	Name Printed or Typed	Name Printed or Typed	
	Address		Address
Email Address	Telephone Number	Email Address	Telephone Number
Date	State Bar No. (if any)	Date	State Bar No. (if any
<u> </u>	Signature	<u> </u>	Signature
	Name Printed or Typed Name Printed or Typed		me Printed or Typed
	Address		Address
Email Address	Telephone Number	Email Address	Telephone Number
Date	State Bar No. (if any)	Date	State Bar No. (if any)
completed by: (Name)			
ss			
Address			
none	Bar Number (If any)	4	

PR-1803, 11/19 Waiver and Consent (Informal Administration) Chapter 865, §§851.21 and 879.09, Wisconsin Statutes
This form shall not be modified. It may be supplemented with additional material.

Consent to Serve (Informal, Formal and Special Administration)

Form No.: PR-1807

<u>Purpose of Form</u>: To provide a written consent to serve as personal representative and acceptance

of duties of the office, including designation of resident agent for service of

process by a nonresident personal representative.

Directions:

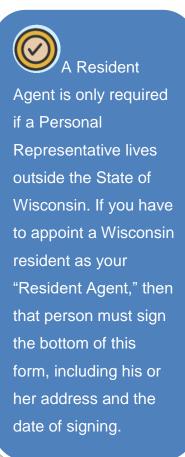
Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any

alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Read Line 1 of the Consent to Serve. You are accepting the duties and responsibilities of personal representative and agree that the court has personal jurisdiction over you in any court proceedings relating to the estate.
- This paragraph applies only if you are required by the Probate Registrar to post a bond before you become the Personal Representative.
- If you live outside the State of Wisconsin, check the box in No. 3
 and fill in the name of the Wisconsin resident you wish to appoint to
 accept service of process on your behalf if that becomes necessary.
 This person is then known as the "Resident Agent."

Check with the Office of Register in Probate to see if you must sign this form prior to meeting with the Registrar or if you must wait until you meet with the Registrar to open the estate.

On the bottom portion of the form: Fill in the "Form completed by" box.



STATE OF WISCO	ONSIN, CIF	CUIT COURT, DECE	EDENT'S COUNTY COUNTY	SAMPLE
IN THE MATTER	OF THE ES	STATE OF	☐ Amended	
WILLIAM ELLIOT Name aka Bill Elliot			Consent to Serve ⊠ Informal Administration □ Formal Administration	
aka Dili Liliot				
			Case No	
I accept t		submit personally to th	sentative special administrator e jurisdiction of the court in any proceerson and agree to be bound by the law	
2. I will file a	any required	d bond.		
☐ 3. I am a no	nresident c	f Wisconsin.		
I appoint process.	[Name]		as resident agent	to accept service of
			Signa	ture
			Mary Smith	
			Name Printe 555 Blank Street	d or Typed
			Addr	
			Someplace, WI 511111 Email Address	(715) 999-9999 Telephone Number
			May 25, 2022	N/A
			Date	State Bar No. (if any)
I accept appointn	nent as resi	-	nce by Resident Agent ate to accept service of process.	
Form completed by: (Nam	20)			
Mary Smith	ie)		Resider	ut Agent
Address 555 Blank Street				
Someplace, WI 511	11		Name Printe	ed or Typed
Email Address M.Smith.address@e	mail.com		Addi	ress
Telephone Number (715)999-9999		Bar Number (If any)	Email Address	Telephone Number
(113)777-7777		N/A	Date	State Bar No. (if any)

PR-1807, 11/19 Consent to Serve (Informal, Formal, and Special Administration) §§856.23, 865.08(2), 867.17 and 879.67, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

Notice to Creditors (Informal Administration)

<u>Form No.:</u> <u>PR-1804</u>

Purpose of Form: To set a deadline for filing claims in an informal administration in which all

interested persons have signed waivers consenting to informal administration.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Line 2: fill in decedent's date of birth, date of death, county, state and address.
- The Probate Registrar will fill in the claims date on Line 4, the location for filing the claim on Line 5.
- Fill in the "Form completed by" box.
- Your Registrar will identify the eligible newspapers for publication.

The Probate Registrar will provide a copy to the Personal Representative.

The Personal Representative is responsible for forwarding a copy of the Notice to Creditors to the newspaper for publication. It must be sent promptly, as the first publication must occur within 15 days of the date the

Probate Registrar signed the Notice to Creditors. Failure to do so will result with having to resubmit the Notice to Creditors.

The Personal Representative is also responsible for serving a copy of the Notice to Creditors to "all known or reasonably ascertainable creditors," as indicated on the form.



STATE	OF WISCONSIN, CIRCUIT	COURT, DECEDENT'S	COUNTY COUN	ГҮ
IN THE	MATTER OF THE ESTATE	OF		Amended
WILLIA Name	AM ELLIOTT			ce to Creditors al Administration)
Aka Bil	l Elliot		•	
PLEA	SE TAKE NOTICE:			
1.	An application for informal	administration was filed.		
2.		County, State of Wisconsi	in	<u>January 10, 2022</u> , was domiciled, with a mailing address of <u>123</u> .
3.	All interested persons waiv	ed notice.		
4.	The deadline for filing a cla	im against the decedent's	estate is [Date]	
5.	A claim may be filed at the Courthouse,	Decedent's County		County
	•	, Wisconsin, Room <u>#</u>	<u>###_</u> .	
Mary S Address 555 Bla	pleted by: (Name) mith ank Street lace, WI 51111			
Telephone	•	Bar Number (If any)		
(715) 9	99-9999	N/A		
DO NO	Γ PRINT the following text wh	en publishing this notice.		
Notice	to Newspaper and Personal R	Representative:		
	Notice must be given by publication of this notice in the following newspaper: County's Official Paper			

The personal representative is responsible for providing the deadline for filing a claim against the decedent's estate to all known or

ors (Informal Administration) §§859.01, 859.07, 879.03 and 879.05, Wisconsin Statutes This form shall not be modified. It may be supplemented with additional material.

once a week for three consecutive weeks; the first publication date must be within 15 days from the date of this notice.

reasonably ascertainable creditors.

PR-1804, 10/10 Notice to Creditors (Informal Administration)

Notice Setting Time to Hear Application and Deadline for Filing Claims

(Informal Administration)

<u>Form No.:</u> <u>PR-1805</u>

<u>Purpose of Form:</u> To give notice to interested persons of the hearing time and date on the

Application for Informal Administration; to give notice to creditors and set the

deadline for filing claims. If the decedent did not have Will, this form cannot be used. You must then have Waiver and Consents from ALL interested persons, or you must proceed with a formal

administration.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Line 2: fill in decedent's date of birth, date of death, county, state and address.
- The Probate Registrar will fill in the necessary information on Line 3, claims date on Line 4, the location for filing the claim on Line 5.
- In the lower left-hand corner of the form fill in the name, address and telephone number of the Personal Representative.
- Your Registrar will identify the eligible newspapers for publication.

The Applicant is responsible for

- Mailing a copy of this Notice, a copy of the Application for Informal Administration, and a copy of the Will and Codicil (if any) to all interested persons.
- Mailing a copy of this Notice to "all known or reasonably ascertainable creditors," as indicated on the form.
- Completing an Affidavit of Service (Probate) PR-1817 indicating when a copy of this Notice,
 Application for Informal Administration and Will and Codicil were provided to all interested persons.

 Forwarding a copy of this Notice to the newspaper for publication. It must be delivered to the newspaper promptly, as the first publication must occur within 15 days of the date the Probate Registrar signed the Notice.

If there are persons interested in the estate but you do not know their names and/or addresses, on line 6 of this form, check the box and insert the names of the persons who are unknown for example: unknown heirs of John Miller or unknown issue of Joseph Miller; father of Joseph A. Miller; grandfather of John Miller; a specific person (for example, James Smith) has no known address. Do not check this box unless you are missing addresses and/or names and addresses of unknown persons. A Guardian ad Litem may be required to represent these unknown persons. The Probate Registrar will tell you if this is a requirement.

STA	TE OF WISCONS	IN, CIRCUIT COURT, <u>(DE</u>	CEDENT'S COUNT	TY) COUNT	ГҮ
IN TH	HE MATTER OF THE	ESTATE OF		☐ Amended	
Willia	William Elliott Notice Setting Time to Hear Application				
Name and Deadline for Filing Claims					
$\Lambda V \Lambda$	Bill Elliot		(Inforn	nal Administra	ition)
AKA	DIII EIIIOU		Case No.		
1.	An application for inf	formal administration was filed.			
2.	domiciled in (deceden	date of birth December 30, 1940 ht's county) 23 Something Street, Someplace, V	County, State of		, with a
3.	(decedent's city)	oe heard at the <u>(decedent's coun</u> , Wisconsin, Roomat [Time]	<u>tty)</u> , before _		County Courthouse, Probate Registrar, on
,	You do not need to a	ppear unless you object. The	e application may be	granted if there is	s no objection.
4.	The deadline for filin	g a claim against the decedent	s estate is [Date]		
5.	A claim may be filed	at the Decedent's County, Wisconsin, Room	County Courthouse,		
6.	This publication is no	otice to any persons whose nan	nes or address are unk	nown.	
*DO N	OT PRINT the followi	ing if left blank:			
*		sses of the following interested	persons (if any) are not	known or reasona	bly ascertainable:
-	= =	nmodations due to a disability to pa		•	
prior to		e. Please note that the court does	•	1.	
		rson named below for exact time	e and date.		
Mary S	npleted by: (Name) mith				
Address					
	ank Street lace, WI 51111				
Telephon	e Number	Bar Number (If any)			
(715) 9	99-9999	N/A			

DO NOT PRINT the following text when publishing this notice.

Notice to Newspaper and applicant:

Notice must be given by publication of this notice in the following newspaper: <u>County's Official Newspaper</u> once a week for three consecutive weeks; the first publication date must be within 15 days from the date of this notice.

The applicant is responsible for providing a copy of this notice, a copy of the will and codicils (if any) or notice of the nature and amount of devise or bequest to all interested persons

- 1. by mailing at least 20 days before the hearing; OR
- 2. by personal service at least 10 days before the hearing.

The applicant/personal representative is responsible for providing the deadline for filing a claim against the decedent's estate to all known or reasonably ascertainable creditors.

PR-1805, 10/10 Notice Setting Time to Hear Application and Deadline for Filing Claims (Informal Administration)

§§859.01, 859.07, 865.05, 879.03 and 879.05, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

Page 44 of 91

Statement of Informal Administration

<u>Form No.:</u> <u>PR-1808</u>

<u>Purpose of Form:</u> To grant the Application for Informal Administration and allow Domiciliary Letters

to be issued to the proposed Personal Representative.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

Page 1

- In Line 4, place a check in the appropriate box:
 - Check the first box if notice to interested persons had to be published.
 - o Check the second box if all interested persons signed a Waiver and Consent form
- In Line 5, insert the date of death and:
 - Check the box if there is no Will.
 - Check the box if there is a Will and insert the date of the Will and codicil.
 - Check the appropriate box indicating where the Will is located.
- In Line 6, insert the name of the nominated Personal Representative.
- Read Line 7 and check the appropriate box.

Page 2

Below the words "THE PROBATE REGISTRAR STATES:"

- In Line 2, if there is a Will, insert the date of the Will.
- In Line 3, if there is a Codicil, insert the date of the Codicil.
- In Line 4, insert the name of the nominated Personal Representative and check the appropriate box about a bond.
- In Line 5, if Letters of Trust must also be issued, insert the name of the Trustee and check the appropriate box concerning a bond

Fill in the "Form completed by" box.

The Probate Registrar will insert any additional information required on this form and sign and date it.



	STATE OF WISCONSIN, CIRCUIT COL	IRT, DECEDENT'S COUNTY COUNTY
IN THE MA	TTER OF THE ESTATE OF	☐ Amended
WILLIAM I	ELLIOT	Statement of Informal Administration
AKA Bill E	lliot	Case No. <u>2022PR000111</u>
An App	olication for Informal Administration	was filed.
THE PRO	DBATE REGISTRAR FINDS:	
1. T	he application is complete, includir	ng verification.
2. T	he applicant is an interested perso	n.
3. T	he court has jurisdiction and is the	proper venue.
r [The requests and consents regardinatice is ☐ given to all persons entitled to no ☐ waived.	g use of informal administration are complete and otice.
a	B. are in possession of the accompanied the application	; and codicil(s) (if any) dated; that e court cation ere and an authenticated copy accompanies the t(s) executed in compliance with the statutes and
_	The nominated personal representa	
а	re not disqualified by law or otherw	ise deemed unsuitable.

7.	Administration	is pending either	before the court or ir	or in another jurisdiction, <i>OR</i> another jurisdiction and no of probate accompanies the
8.	Other: The Will not	minated Albert Ellio	ott, as personal represe	entative. He has declined to act.
THE P	ROBATE REGISTR	AR STATES:		
1.	The application for	informal adminis	tration is granted.	
⊠ 2.	The will dated Octo	ober 1, 2020	_ is admitted.	
3.	The codicil(s) (if any	dated	are admitted.	
4. ⊠ 5.	\$ 200,000.00 Letters of trust are	required. acceptance of issued to Mary St	a signature bond.	
	and no bond is	required. acceptance of		a surety bond in the sum of
□ 6.	Other:			
☐ See	attached for any	additional trusts		
Form comple Mary St	eted by: (Name) mith			
Address	1 0			
	nk Street ace, WI 51111			
Telephone N		Bar Number (If any)		
(715) 999	9-9999	N/A		

PR-1808, 10/21 Statement of Informal Administration §853.04 and Chapters 865 and 879, Wisconsin Statutes
This form shall not be modified. It may be supplemented with additional material.

Domiciliary Letters

Form No.: PR-1810

<u>Purpose of the Form:</u> To provide written evidence that a person has been authorized by the court

to act as Personal Representative

on behalf of the estate.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the

Certified copies of the Domiciliary Letters are available for a fee from the Office of Register in Probate.

Probate Registrar will assign the case number, unless a number has already been assigned.

- Fill in the section after "To:" with the name and address of the Personal Representative.
- Fill in the decedent's date of birth, date of death, county and state.

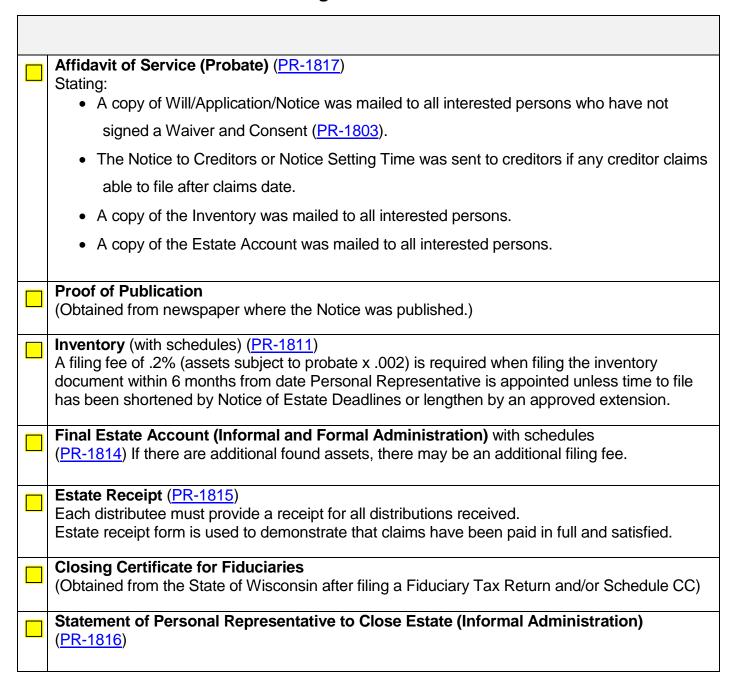
Co-Personal
Representative are required to act jointly unless the Will allows them to serve independently.

Fill in the "Form completed by" box.

STATE OF V	VISCONSIN, CIRCUIT COURT, D		COUNTY
IN THE MATTER O	F THE ESTATE OF	☐ Amended	
WILLIAM ELLIOT Name AKA Bill Elliot		Domiciliary Letters	
		☐ Informal Administration	
		Formal Administration	
		Case No. <u>2022PR000111</u>	
To: Mary Smith			
555 Blank Str	ant		
Someplace, W	T 51111		
		and date of death January 10, 2022	
Decedent's County		County, State of Wisconsin	
You are granted dor	miciliary letters with general power	rs and duties of a personal representative.	
You are authorized	to administer the estate as require	ed by law.	
Other:			
Form completed by: (Name)			
Mary Smith			
Address			
555 Blank Street			
Someplace, WI 51111			
Telephone Number (715) 999-9999	Bar Number (If any) N/A		

PR-1810, 10/10 Domiciliary Letters (Informal Administration and Formal Administration) §§856.21 and 865.08, Wisconsin Statutes
This form shall not be modified. It may be supplemented with additional material.

Checklist for Closing an Informal Estate Administration



Inventory (Informal and Formal Administration)

Form No.: PR-1811

<u>Purpose of Form:</u> To identify any property and assets in which the

decedent had any interest and list the fair market value of such interests on the date of death that are

subject to estate administration.

Directions:

Complete Page 2 first; your totals from Page 2 are carried over to the

summary section of Page 1

PAGE 1.

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number assigned.

- Fill in date of death where designated.
- Fill in total value of property/assets subject to administration (from page 2).
- Fill in total value of encumbrances, liens or other charges (from page 2).
- Fill in net value of property/assets subject to administration (from page 2).
- Sign inventory in front of a notary public (after all Schedules are completed on page 2).
- Fill in the "Form completed by" box.

PAGE 2.

- Fill in case number.
- List/describe, by numbered item the property subject to administration and fair market values as of date of death. Include accrued interest and dividends, if any.
- Identify each item of property that is marital property. Remember for married persons, each owns
 one half of the items of marital property regardless of title. You may want to consult a lawyer
 regarding this issue.
- List with each item of property any encumbrance, lien, or charge.
- This is not meant for listing "charge cards." A "charge" is something like a lien or encumbrance on a specific item of property. A mortgage, for example, is an encumbrance on real estate.
- Even if the charge exceeds the value, the net value of the asset cannot be less than -0-
- Attach supporting schedule, if necessary read the form carefully.

The second Inventory example on page 53 shows how martial property would be classified.



STATE OF WISCONSIN, CIRCU	JIT COURT, <u>Dec</u>	edent's County COUN	TY SAMPLE
IN THE MATTER OF THE ESTATE OF	 F	☐ Amended	
WILLIAM ELLIOTT Name		Inventory ☑ Informal Administratio ☐ Formal Administration	n
AKA Bill Elliott			
		Case No. <u>2022PR000011</u>	_
UNDER OATH, I STATE:	tradical control of control	and the land the transfer of the sale	and the final state.
As personal representative, I certify that 1. All property subject to adm	•	nowleage this inventory with scr	nedules includes:
2. Any encumbrance, lien or o		t each item of property.	
3. Identification of marital prop		d as as sides d by Jan.	
I will furnish a copy of this inventory to a	·	· · · · · · · · · · · · · · · · · · ·	
SUMMARY OF PROPER (Value of Deced	TY SUBJECT TO All ent's Interest on date of c		Date of Death 04/10/2022
Total value of property subject to adm	ninistration		\$ 446,432.39
Minus total value of encumbrances, lie			\$ (307,206.37)
Net Value of Property Subject to Adm	inistration (cannot b	e less than \$0)	\$ 139,226.02
Provide itemized lists on attac	hed schedules and	I clearly designate any marita	I property interests.
Note: A statutory filing fee must acc	company this form.		
State of Wisconsin County of		Personal Re	presentative
Subscribed and sworn to before me on		Mary P. Smith Name Printe	
Notary Public/Court Official		555 Blank St., Someplace, WI.	51111
Name Printed or Typed		M.Smith.Address@email.com	262-666-5555
My commission/term expires:		Email Address	Telephone Number
☐ This notarial act involved the use of communic	cation technology.	November 15, 2022 Date	State Bar No. (if any)
State of		>	
County of Subscribed and sworn to before me on		Personal Re	presentative
		Name Printe	ed or Typed
Notary Public/Court Official		Addı	raes
Name Printed or Typed		Addi	655
My commission/term expires:		Email Address	Telephone Number
☐ This notarial act involved the use of communic	ation technology.	 Date	State Per No. (if any)
Form completed by: (Name)		Date	State Bar No. (if any)
Mary P. Smith			
Address 555 Blank Street, Someplace, WI 51111			
Email Address M.Smith.Address@email.com			
Telephone Number	Bar Number (If any)	_	
262-666-5555	N/A		

	Supporting Inventory Schedules	
Number	(Description of property including digital property as defined under §711.03(10), Wis. Stats., legal description of real estate, and related encumbrances, liens or other charges against each item.) Clearly designate marital property.	Value of Decedent's Interest on Date of Death
1.	Lot 1, Block 2 in Avondale Gardens Subdivision, Section 4, Township 12 South, Range 22 East, in the City of Someplace, County of Decedent, State of Wisconsin.	\$350,000.00
	a/k/a 123 Someplace Street, Someplace, WI 51111	
	Solely in the name of William Elliott valued as of date of death	
	Mortgage with Big Bank, N.A. in the amount of \$175,625.32 2nd Mortgage with Prairie Credit Union in the amount of \$96,054.69	
2.	Savings Account with Big Bank N.A. in the name of William Elliott, value as of date of death	\$12,262.82
3.	Checking Account with Prairie Credit Union in the name of William Elliott, valued as of date of death	\$10,525.98
4.	2018 GMC Yukon VIN 1TY125VX121111 in the name of William Elliot, Blue Book value as of date of death	\$27,625.00
	Car loan with Prairie Credit Union in the amount of \$24,251.36	
5.	250 shares of AT&T stock at \$21.17/share with ABC Investments in the name of William Elliott, with a date of death value of	\$5,292.50
6.	175 shares of Apple stock at \$139.77/share with ABC Investments in the name of William Elliott, with a date of death value of	\$2,376.09
7.	2019 Polaris Sportsman Hunt edition in the name of William Elliott, value as of date of death	\$4,725.00
8.	Metropolitan Life Insurance policy #6521589452 payable to the estate of William Elliott, value as of date of death	\$10,000.00
9.	Collection of antique duck decoys appraised value as of date of death	\$1,250.00
10.	Fishing equipment and tackle appraised value as of date of death	\$375.00
11.	Tundra long range hunting rifle appraised value as of date of death	\$3225.00
12.	2014 Ford Explorer VIN 6PR222MN151515 in the name of William Elliott, Blue Book Value as of date of death	\$11,275.00
	Car Loan with Prairie Credit Union in the amount of \$14,216.33 (deductible amount is \$11,275.00)	
13.	Personal property (Household furnishings, tools, yard equipment, jewelry) value as of date of death	\$7,500.00

PR-1811, 05/20 Inventory (Informal Administration and Formal Administration)§§711.03(10), 814.66, 858.01, 858.03, 858.07 and 865.11, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

STATE OF WISCONSIN, CIRCUIT COURT, Dec	edent's County COUNT	
IN THE MATTER OF THE ESTATE OF	☐ Amended	PROPERTY SAMPLE
WILLIAM ELLIOTT Name	Inventory ☑ Informal Administration	
AKA Bill Elliott	☐ Formal Administration	
	Case No. <u>2022PR000011</u>	-
UNDER OATH, I STATE:		
As personal representative, I certify that to the best of my k 1. All property subject to administration.	nowledge this inventory with sch	nedules includes:
Any encumbrance, lien or other charge against	each item of property.	
3. Identification of marital property, if any.		
I will furnish a copy of this inventory to all persons interested	d as required by law.	
SUMMARY OF PROPERTY SUBJECT TO A		Date of Death 4/10/2022
(Value of Decedent's Interest on date of o Total value of property subject to administration	deatn)	\$ 446,432.39
Minus total value of encumbrances, liens or other charges	s against each item of property	\$ (307,206.37)
Net Value of Property Subject to Administration (cannot b		\$ 139,226.02
Note: A statutory filing fee must accompany this f		property interests.
County of	Personal Rep	presentative
Subscribed and sworn to before me on	Mary P. Smith Name Printe	nd or Typed
Notary Public/Court Official	555 Blank St., Someplace, WI3	51111
Name Printed or Typed My commission/term expires:	M.Smith.Address@email.com Email Address	262-666-5555 Telephone Number
☐ This notarial act involved the use of communication technology.	November 15, 2022	State Bar No. (if any)
State of	b	State Bal No. (ii aliy)
County of Subscribed and sworn to before me on	Personal Rep	presentative
Notary Public/Court Official	Name Printe	d or Typed
Name Printed or Typed	Addr	ess
My commission/term expires:	Email Address	Telephone Number
☐ This notarial act involved the use of communication technology.		
Form completed by: (Name) Mary P. Smith	Date	State Bar No. (if any)
Address		

555 Blank Street Someplace, WI 51111

Email Address
M.Smith.Address@email.com

Telephone Number	Bar Number (If any)
262-666-5555	N/A

	Supporting Inventory Schedules	
Number	(Description of property including digital property as defined under §711.03(10), Wis. Stats., legal description of real estate, and related encumbrances, liens or other charges against each item.) Clearly designate marital property.	Value of Decedent's Interest on Date of Death
1.	Lot 1, Block 2 in Avondale Gardens Subdivision, Section 4, Township 12	\$350,000.00
	South, Range 22 East, in the Town of Someplace, County of Someplace, State of Wisconsin.	
	a/k/a 2525 West Rosemary Court, Someplace, WI 53149	
	Solely in the name of James R. Smith valued as of date of death This is marital property	
	Mortgage with Big Bank, N.A. in the amount of \$175,625.32 2 nd Mortgage with Prairie Credit Union in the amount of \$96,054.69	
2.	Savings Account with Big Bank N.A. value as of date of death This is marital property	\$12,262.82
3.	Checking Account with Prairie Credit Union valued as of date of death This is marital property	\$10,525.98
4.	2018 GMC Yukon Blue Book value as of date of death This is marital property	\$27,625.00
	Car loan with Prairie Credit Union in the amount of \$24,251.36	
5.	250 shares of AT&T stock at \$21.17/share with ABC Investments with a date of death value of This is marital property	\$5,292.50
6.	175 shares of Apple stock at \$139.77/share with ABC Investments with a date of death value of This is marital property	\$2,376.09
7.	GMT Engineering LLC member interest, appraised value as of the date of death This is marital property	\$275,000.00
8.	Metropolitan Life Insurance policy #6521589452 payable to the estate, value as of date of death	\$10,000.00
9.	Collection of antique duck decoys appraised value as of date of death This is marital property	\$1,250.00
10.	Tundra long range hunting rifle appraised value as of date of death This is marital property	\$3,225.00
11.	Fishing equipment and tackle appraised value as of date of death this is marital property	\$375.00
12.	2019 Polaris Sportsman Hunt edition value as of date of death This is marital property	\$4,725.00

value as of date of death This is marital property	ipment, jewelry)	\$7,500.00
Total encumbrances, liens or other charges:		
Big Bank Mortgage: Prairie Credit Union 2nd Mortgage \$96,054.69	\$175,625.32	
Prairie Credit Union Car Loan	\$24,251.36	
Prairie Credit Union Car Loan	\$14,216.33	
Total	\$310,147.70	
Less adjustment for car loan in excess of value of asset	(2,941.33)	
Total Deductible encumbrances	\$307,206.37	
	value as of date of death This is marital property Total encumbrances, liens or other charges: Big Bank Mortgage: Prairie Credit Union 2nd Mortgage \$96,054.69 Prairie Credit Union Car Loan Prairie Credit Union Car Loan Total Less adjustment for car loan in excess of value of asset	This is marital property Total encumbrances, liens or other charges: Big Bank Mortgage: \$175,625.32 Prairie Credit Union 2nd Mortgage \$96,054.69 Prairie Credit Union Car Loan \$24,251.36 Prairie Credit Union Car Loan \$14,216.33 Total \$310,147.70 Less adjustment for car loan in excess of value of asset (2,941.33)

PR-1811, 05/20 Inventory (Informal Administration and Formal Administration)§§711.03(10), 814.66, 858.01, 858.03, 858.07 and 865.11, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

Estate Account

<u>Form No.:</u> <u>PR-1814</u>

<u>Purpose of the Form:</u> For the Personal Representative to make a written accounting of all receipts,

expenses and distributions affecting the property subject to administration.

Directions:

PAGE 1.

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the appropriate box (interim), (final) or (supplemental) and the box for "Informal Administration." Fill in the case number assigned.

Check the box for personal representative and fill in the date of death of the decedent and the date on which you are completing the form.

Start on page three.

Page one is a summary of the total figures from the schedules located on page 3.

Under "Receipts:"

- Inventoried Assets: Insert the Net Value of Property figure from the Inventory on file;
- Schedule A Added Property: List the total of any property found after filing the Inventory other than dividends, interest or capital gains; an additional filing fee may be required. (adds to the value of the property subject to administration)
- Schedule B Dividends: List the total of any dividends received and not already listed in the Inventory;
- Schedule C Interest: List the total of any interest received and not already listed in the Inventory;
- Schedule D Capital Gains/Losses: List the total of any capital gains or losses;
- Schedule E Other Receipts: List the total of any other property received and not accounted for in Schedules A-D.
- Balancing Totals: Add all the amounts in the "TOTAL" column regarding receipts (Schedules A-E) and enter it in the space next to "Total".

Under "Disbursements:" Paid by Estate Assets:

- Schedule F Funeral Expenses: List the total of the funeral expenses.
- Schedule G Debts of Decedent: List the total of all debts.

- Schedule H Claims: List the total of all claims.
- Schedule I Taxes Paid: List the total of all taxes.
- Schedule J Interest Paid: List the total of all interest.
- Schedule K Administration Expenses: List the total of all administrative expenses.
- Schedule L Other payments: List the total of all other bills paid other than attorney fees.
- Schedule M Distributions Paid to Date: List the total of all partial payments made to each
 individual beneficiary (or heir, if there has been no Will admitted to administration) up to the
 date of preparing this Estate Account.

Total Disbursements: Add all the amounts in the "TOTAL" column regarding disbursements

- (Schedules F-M) and enter it in the space next to the "total disbursements".
- Schedule N Assets on Hand: Value of assets that remain to be distributed.
- Balancing Totals: Add the total disbursements and the total assets on hand and enter that total as the "TOTAL" for the disbursements column.

Proposed Distribution of Assets on Hand (Schedule O): Should be the same figure as shown in Schedule N, above.

- List the total of all payments to be made to each individual beneficiary (or heir, if there has been no Will admitted to administration).
- "Total Fees:" Insert the amount of any personal representative fees, guardian ad litem fees, special administrator fees, and attorney fees (if none, state) paid during the administration of the estate.

The Personal Representative or Co-Personal Representatives must sign this document in front of a Notary Public.



Receipts and for Disbursements and Assets on Hand MUST be the same. If they are not, there is an error.

PAGE 2.

- Insert the case number.
- Provide the information required in the "Form Completed by" box.
- Insert the names of the interested persons, their addresses and, if minors, their dates of birth.

PAGE 3.

- Insert the case number.
- List Schedules A-O: List in detail the amounts for each schedule, for example:

Schedule F – Funeral Expenses:

Sunset Monuments	\$2,700.00
John's Funeral Home	. ,
The total of this Schedule	•
(This should then be inserted on Page 1 of the Estate Account in the	. ,
Disbursements column, Funeral Expenses Schedule F.)	

STATE OF WISCONSIN, CIRCUIT	COURT, DEC	EDENT'S CO	UNTY COU	NTY	SAMPLE
IN THE MATTER OF THE ESTATE William Elliott Name			☐ Amended ☐ Interim ☑ Final	ntal .	
a/k/a Bill Elliott			☐ Supplemer Estate Account		
			nformal ninistration		
		F	Formal Administra	ation	
		С	ase No. <u>2022PR000011</u>		
UNDER OATH I VERIFY:				<u> </u>	
I am the ⊠ personal representative correct. The following is my accoun 04/10/2022		stration of this	-		te account]
RECEIPTS		TOTAL	DISBURSE	MENTS	TOTAL
Net Value of property, subject to admin Inventory (or assets on hand as of last est		139,226.0	2 Funeral Expenses	Schedule (F)	15,877.26
Added Property to which the decedent on Date of Death not included in Invent Estate Account, including refunds. S		3,250.0	0 Debts of Decedent	(G)	351.36
Dividends	(B)	181.8	8 Claims (including those	e by judgment) (H)	7,586.98
Interest	(C)	4.2	6 Taxes Paid	(I)	9,771.50
Capital Gains (Losses)	(D)	(\$10,620.53) Interest Paid	(J)	7,437.09
Other Receipts	(E)		Administration Exper		3,358.65
			Other Payments	(L)	2,278.27
			Distributions Paid to	` '	40,000.00
			TOTAL DISBURSEN Assets on Ha		86,661.11 45,380.52
	TOTAL	132,041.6		TOTAL	132,041.63
	TOTAL	132,041.0		TOTAL	132,041.03
Totals in ea	ach column mu		ne. 132,041.63		
•	es paid during		· ·		
	ersonal Represe		\$8,602.61		
	uardian Ad Litei		\$375.00		
Sp	ecial Administr	ator:			
At	torney:				
State of Wisconsin					
County of Wherever			Personal Represe	entative/Special Administra	ator
Subscribed and sworn to before me on		<u>Ma</u>	ry P. Smith	Printed or Typed	
Notary Public/Con	urt Official	555	5 Blank Street, Someplac		
Name Printed or Tyl	ped		rysmith@internet.com	715-	999-9999 none Number
This notarial act involved the use of con	nmunication techno			. 31001	

Date

State Bar No. (if any)

State of			
County of		Personal Repres	sentative/Special Administrator
Subscribed and sworn to bef	ore me on		
		Nam	ne Printed or Typed
Notary Pu	ıblic/Court Official	·	
			Address
	Printed or Typed		
My commission/term expires:		Email Address	Telephone Number
☐ This notarial act involved the	use of communication technology.		
_	<i>.,</i>	Date	State Bar No. (if any)
Form completed by: (Name)			
Address			
Email Address			
Email Address			
Telephone Number	Bar Number (If any)		
. 5.5p55	2aa2a. (a.i.y)		
Form completed by: (Name) Address Email Address Telephone Number Bar Number (If any)			

ESTATE ACCOUNT SUPPORTING SCHEDULE

List of Interested Persons

The names and mailing addresses of all interested persons are as follows:

(For any person with disabilities, also list any guardian of estate; for any person in the military, also list attorney or attorney in fact; and for any minor, list date of birth.)

Name	Mailing Address	If Minor, Date of Birth
Mary Smith, individually and as Trustee	555 Blank Street, Someplace, WI 51111	
John Miller	100 First Street, Someplace, WI 51111	June 1, 2015
George Johnson, Guardian ad Litem for John Miller	200 First Street, Someplace, WI 51111	
Susan Brown	100 Second Street, Someplace, WI 51111	
Jane Jones	100 Third Street, Anyplace, WI 52222	
Jacob Jones, Guardian of Estate for Jane Jones	100 Third Street, Anyplace, WI 52222	

Schedule (A - O)	Estate Account Supporting Schedules (List details of each schedule)	Amount
A.	Refund from Hartland Insurance Company for car insurance	\$175.00
A.	Refund from IRS	\$2,200.00
A.	Refund form Wisconsin Dept. of Revenue	\$875.00
В.	AT&T stock	\$53.52
В.	Apple stock	\$128.36
C.	Savings account at Big Bank, N.A.	\$3.63
C.	Checking Account at Prairie Credit Union	\$0.52
C.	Estate checking account at Prairie Credit Union	\$0.11
D.	Capital Loss from sale of 2525 W. Rosemary Ct., Anywhere, WI	(\$11,056.32)
D.	Capital Gain from sale of GMT Engineering LLC	\$26,525.00
D.	Capital Gain from sale of AT&T stock	\$625.00
D.	Capital Loss from Sale of Apple stock	(\$189.21)
F.	Shady Pines Funeral Home	\$13,251.52
F.	Amazing Grace Cemetery and Mausoleum	\$750.00
F.	Rock of Ages Monuments	\$1,250.00
F.	Williams Restaurant (funeral buffet)	\$625.74
G.	Checks written prior to death but cashed after death	\$351.36
H.	Phillips Collection service for Menard's Mastercard	\$1,256.36
Н.	Dr. John Franks	\$675.00
Н.	Metro Ambulance Co.	\$125.00
Н.	American Express	\$5,265.99
H.	Donald's Plumbing Service	\$264.63
I	Prorated Real Estate Taxes from Closing on 2525 W. Rosemary Ct., Anywhere	\$1,315.26
I	2022 Real Estate Taxes 2525 W. Rosemary Ct., Anywhere	\$8,456.24
J.	Big Bank N.A. (first mortgage)	\$5,253.26
J.	Prairie Credit Union (second mortgage)	\$1,528.98
J.	Prairie Credit Union (car loan)	\$654.85
K.	Konkel Publications	\$61.59
K.	Inventory Filing Fee	\$828.45
K.	Filing Fee on Added Property (schedule A)	\$6.50
K.	Attorney John Findem (GAL)	\$375.00
K.	Mary Smith PR Fees	\$8,602.61
L.	WE Enegies	\$175.16
L.	Spectrum Cable Service	\$75.26
L.	Fair Market Appraisal Services	\$550.00
L.	A-1 Disposal Service	\$450.00
L.	Radiology Physicians Inc.	\$35.25
L.	Fairway Heating and Air Conditioning Inc.	\$215.35
L.	Green Yardcare and Maintenance Inc.	\$425.00
L.	Top of the Hill Water and Septic Service	\$215.00
L.	Newsome Pharmacy	\$62.25
L.	Big Bank N.A. service charges	\$50.00
L.	Prairie Credit Union check charges	\$25.00

M.	Mary P. Smith	\$10,000.00
M.	James J. Smith	\$10,000.00
M.	Jane R. Jones	\$10,000.00
M.	Judy A. Case	\$10,000.00
N.	Estate Checking Account at Prairie Credit Union	\$38,865.02
O.	Mary P. Smith	\$11,345.13
O.	Mary Smith as Trustee	\$11,345.13
O.	Susan Brown	\$11,345.13
O.	Jacob Jones as guardian of the estate for Jane R. Jones	\$11,345.13

PR-1814, 05/20 Estate Account (Informal Administration and Formal Administration) §\$862.01, 862.05, 862.07, 862.11 and 865.16(1)(c), Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

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Estate Receipt

Form No.: PR-1815

Purpose of Form: To show that creditors, heirs, beneficiaries or trustees have received what is due

them from the decedent's estate.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number assigned.

- Check the "personal representative" box and describe the property covered by the issuance of the receipt. (Cash payment, items of personal property, stocks, bonds, etc.)
- Check the appropriate No. 2 box if this is a distribution to an heir/beneficiary other than a trust.
- If the receipt is for a claim against the estate, place a check in No. 3, fill in the name of the claimant and the amount of the claim.
- If this is a distribution to a living or testamentary trust, place a check in No. 4 and insert the name
 of the trust.

Fill in the "Form completed by" box.

Recipient signs the receipt, adding his or her address and the date signed.

NOTE: A receipt is required for all distributions in an estate.

STATE OF WISCONSIN,	CIRCUIT COURT, (DECE	DENT'S COUNTY) COUNTY	SAMPLE
IN THE MATTER OF THE ES	STATE OF	☐ Amended	
WILLIAM ELLIOT		Estate Receipt	
Name		☐ Informal Administration	
Aka Bill Elliot		Formal Administration	
		Case No. <u>2022PR000011</u>	
1. I received from the	☑ personal representative	special administrator of this	estate the following:
	Describe items of	property or monies received	
Cash \$3,277.42			
☐2. This is a ☐ partial ☐	full distribution of my sh	nare of the estate	
		iare of the estate.	
	on of the claim filed by Some	place Hospital in the	ne amount of \$3,277.42 .
	funds to trust. [Identify Trust]		·
☐ 5. Other:			
Form completed by: (Name)			
Mary Smith Address		Signatu	ıra
555 Blank Street		Someplace Hospital	
Someplace, WI 51111		Name Printed	or Typed
Somepiace, W131111		100 Twelfth Street, Someplace, W	T 51111
Email Address		Addres	SS
M.Smith.Address@email.com		Email Address	
Telephone Number	Bar Number (If any)	(715) 888-2222	
(715) 999-9999		(713) 888-2222 Telephone Number	Date

PR-1815, 11/19 Estate Receipt (Informal Administration or Formal Administration) §§863.41, 865.21, and 867.21, Wisconsin Statutes
This form shall not be modified. It may be supplemented with additional material.

s	TATE OF WISCONSIN	, CIRCUIT COURT, <u>(DEC</u>	EDENT'S COUNTY) COUNTY	SAMPLE
IN TH	E MATTER OF THE ES	STATE OF	☐ Amended	
WILL	IAM ELLIOT		Estate Receipt	
Name				
Aka B	ill Elliot		☐ Formal Administration	
			Case No. <u>2022PR000011</u>	
1.	I received from the	□ personal representative		estate the following:
		Describe items	of property or monies received	
	Toy Train Sets			\$ 2,500.00
	100 Shares GHI Compa	ny		\$ 5,831.00
	Household Furnishings,	Tools, Riding Lawn Tractor	, Jewelry	\$ 7,850.00
	Cash - 1/4 residual share	2		\$ 38,709.80
⊠2.	This is a partial	\boxtimes full distribution of my	share of the estate.	
□ 3.	This is a full satisfaction	on of the claim filed by	in th	ne amount of \$
□ 4.	This is a distribution o	f funds to trust. [Identify Trus	st]	
⊠ 5.	Other: I waived Person	al Representative's fee		·
	ompleted by: (Name)			
	Smith		Signatu	uro.
Address	s Blank Street		Mary Smith	ile
	place, WI 51111		Name Printed	or Typed
Bome	piace, WISIIII		555 Blank Street, Someplace, WI	
Email A	ddress		Addres	SS
M.Sn	nith.Address@email.c	com	M.Smith.Address@email.com Email Address	
	one Number	Bar Number (If any)	(715) 999-9999	
(715)	999-9999		Telephone Number	Date

PR-1815, 11/19 Estate Receipt (Informal Administration or Formal Administration) §§863.41, 865.21, and 867.21, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

STATE	OF WISCONSIN, CIRCUIT O	OURT, (DECEDENT'	S COUNTY)	COUNTY	SAMPLE
IN THE	MATTER OF THE ESTATE (OF	☐ Amende	ed	
WILLIAM ELLIOT			Estate Red	ceipt	
Name	INT DEBIG I		Informal Adm	ninistration	
Aka Bi	ll Elliot	<u>=</u>	Formal Admi		
		 	ase No. <u>2022PR0</u>	00011	
1.	I received from the 🛛 perso	nal representative	special admin	istrator of this	estate the following:
		Describe items of p		es received	
	150 Shares EDF, Inc.	\$ 2,284.5			
	311 Shares XYZ Co.	\$ 4,546.8			
	100 Shares Ltd. Foods, Inc.	\$ 12, 011.			
	200 Shares ACME Corporation	\$ 4,910.0			
	Cash – ¼ Residual Share	\$ 38,709.8	32		
□ 2.	This is a ☐ partial ☐ full	distribution of my shar	e of the estate.		
□ 3.	This is a full satisfaction of the	claim filed by		in th	e amount of \$
⊠ 4.	This is a distribution of funds t	o trust. [Identify Trust] $\underline{\mathrm{Tr}}$	ust under the Will	of William Elliott	For the Benefit of John
□ 5.	Other:				
			1		
	mpleted by: (Name)				
Mary S Address	Smun			Signatu	re .
	lank Street		Mana Caraith Tana	- 9	
			Mary Smith, Trus	Name Printed	or Typed
Some	blace, WI 51111		555 Plank Street	, Someplace, WI	
			555 Blank Street.	, Somepiace, W1. Addres	
Email Ad			M Smith Address	s@email.com	
	ith.Address@email.com	1 (1)	Email Address		
		nber (If any)	(715) 999-9999		
(/15)	999-9999		Telephone Number		Date

PR-1815, 11/19 Estate Receipt (Informal Administration or Formal Administration) §§863.41, 865.21, and 867.21, Wisconsin Statutes
This form shall not be modified. It may be supplemented with additional material.

Affidavit of Service

<u>Form No.:</u> <u>PR-1817</u>

<u>Purpose of Form</u>: A sworn statement indicating the names and addresses of all interested persons

to whom various documents are mailed.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number assigned.

When you complete this form, you are swearing that you mailed a copy of a specific document OR documents to a certain party or parties concerned with the estate.

- Insert your name where indicated and the city and state where you live.
- Insert the mailing or service date next.
- In the "Documents Provided" section, insert the name of the document or documents that you
 have mailed or served. (i.e. Estate Inventory or Estate Account)
- Check the box to indicate whether a copy is already in the estate file in the Office of Register in Probate or if a copy of that document(s) is attached to the affidavit.
- Insert the names and addresses of all the individuals/businesses/creditors to which you have mailed a copy of the document you inserted earlier in this form and state the type of service (i.e. mail, personal service).
- Fill in the "Form completed by" box.

DO NOT SIGN THIS FORM until you are in front of a Notary Public. The Probate Registrar may also witness your signature.

STATE OF WISCONS	IN, CIRCUIT COURT, <u>DECEI</u>	DENT'S COUNTY COUNTY	SAMPLE	
IN THE MATTER OF THE I	· ·	Amended		
WILLIAM ELLIOT Name		Affidavit of Service (Probate)		
AKA Bill Elliot		Case No. <u>2022PR000011</u>		
I, [Name] Mary Smith State of Wisconsin	being sworn, state that on [Dai	Of [City] Someplace	pies of the following documents	
State of wisconsin ,		nts Provided	pies of the following documents	
Notice to Creditors the original of whice a copy of which is	h is on file, OR attached (no original on file)			
to the following named pers	ons at the mailing address as	listed:	☐ See attached	
NAME		ADDRESS	TYPE OF SERVICE***	
Northwest Savings Bank	1 Northwest Plaza, Somepla	ce, WI 51111	First Class Mail	
Southeast Savings & Loan	101 South Fifth Street, Someplace, WI 51111		First Class Mail	
*** TYPE OF SERVICE: Refe	r to Wisconsin Statutes for proper	r manner of service.	Type of Service: Personal Service Mail Certified mail return receipt requested	
State of		•		
County of		S	ignature	
Subscribed and sworn to be	efore me on	Mary Smith		
Notary Pub	olic/Court Official	555 Blank Street, Someplace,	rinted or Typed WI 51111 .ddress	
Name Printed or Typed My commission/term expires:		M.Smith.Address@email.com Email Address	(715) 999-9999 Telephone Number	
☐ This notarial act involved the use of communication technology.		Date	N/A State Bar No. (if any)	
Form completed by: (Name) Mary Smith Address 555 Blank Street, Someplace,	WI 51111			
Email Address M.Smith.Address@email.com Telephone Number	Bar Number (If any)			
(715) 999_9999	N/A			

PR-1817, 05/20 Affidavit of Service (Probate)

§§865.11(2), 865.16(1)(c), 879.05 and 879.07, Wisconsin Statutes This form shall not be modified. It may be supplemented with additional material.

Statement of Personal Representative to Close Estate

Form No.: PR-1816

<u>Purpose of Form:</u> To verify that the Personal Representative has completed the estate.

Directions:

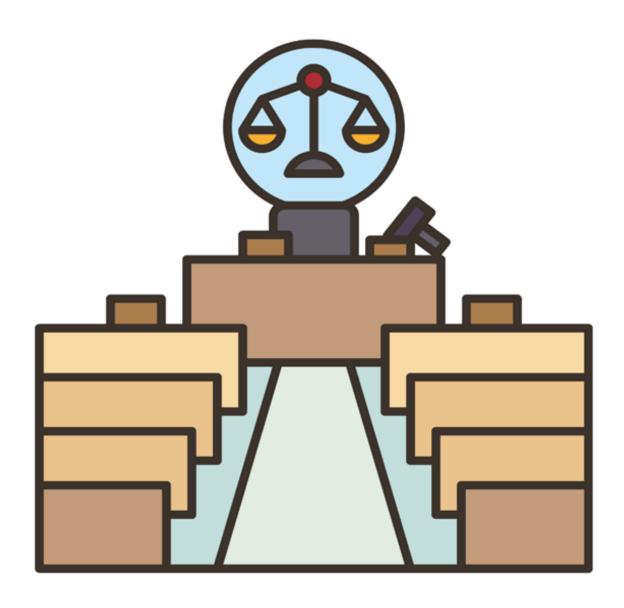
Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number assigned.

- Read paragraphs 1-3 and 5-6 and determine if you have completed all tasks.
- In No. 4, check the appropriate box and if claims have not been paid, insert the arrangements made to accommodate those unpaid claims.
- In No. 7, insert the amount of any attorney fees paid.

The Personal Representative must sign the Statement in front of a Notary Public.

STAT	E OF WISCONSIN, CIRCUIT COURT, <u>DE</u>	ECEDENT'S COUNTY	COUNTY	SAMPLE	
IN TH	IE MATTER OF THE ESTATE OF	☐ Amended	ı		
WILLIAM ELLIOT P		Personal Represe	entative's		
Name		Statement to Clos	se Estate		
AKA	Bill Elliot	(Informal Adminis	stration)		
		Case No. <u>2022PR000</u>	0011		
I VER	IFY THAT I, OR A PRIOR PERSONAL RI	EPRESENTATIVE WHOM I H	AVE SUCCEEDE	ED:	
1.	Gave notice to interested persons and to prior to the date of this statement.	creditors as required by law a	nd the time for fili	ing claims expired	
2.	Fully administered the estate by making perpenses of administration, reasonable for otherwise specified below.				
3.	Inventoried the assets of the estate, furni assets to the persons entitled to them.	shed a copy of the inventory to	o interested perso	ons and distributed the	
4.	☒ Am aware of no unpaid claims, expen☒ Made the following detailed arrangem		standing liabilities	s:	
5.					
6.	Furnished a full account of the administra	ation, in writing, to all persons	whose interests a	are affected.	
7.	The amount of attorney fees paid or to be	e paid from estate assets is $\$0$.00		
8.	Understand that if no proceedings challer representative are pending in the court 6 representative terminates.				
State	of _	>			
County			Personal Representat	tive	
Subsc	ribed and sworn to before me on	Mary Smith	Name Printed or Typ	ped	
	Notary Public/Court Official	555 Blank Street, So		1	
	Name Printed or Typed	M.Smith.address@e	Address mail.com	(715)999-9999	
Му со	mmission/term expires:		man.com	Telephone Number	
☐ This	notarial act involved the use of communication techn	nology. Date		N/A State Bar No. (if any)	
State	of	>			
County			Personal Representat	tive	
Subsc	ribed and sworn to before me on		Name Printed or Typ	ped	
	Notary Public/Court Official		Address		
N 40	Name Printed or Typed				
-	mmission/term expires:			Telephone Number	
∐ This	notarial act involved the use of communication technical	nology. Date		State Bar No. (if any)	

Supplemental Forms



Declination to Serve or Resignation

<u>Form No.:</u> <u>PR-1802</u>

<u>Purpose of the Form</u>: To allow the person who has been nominated in the Will as personal

representative or executor to decline to act as such personal representative

or executor. This form may also be used if a Personal Representative,

Special Administrator or Trustee must resign.

Directions for Resignation:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- In 1, check the appropriate box or boxes that apply.
- The person who is declining to act must sign and date this form where indicated and fill in the "Form completed by" box.

Directions for Resignation:

At the top of the form insert the name of the decedent's county of residence and add the decedent's name just below the words "In the Matter of the Estate of..." Check the box for "Informal Administration." Fill in the case number.

- Check the box for your title.
- Give the reason for your resignation.
- The person who is resigning must sign and date where indicated and fill in the "Form completed by" box.

STATE OF WISCONSIN, CIRC	UIT COURT, (DECEDI	ENT'S COUNTY) COUNTY	SAMPLE
IN THE MATTER OF THE ESTATE	OF	☐ Amended	
William Elliott Name		Declination to Serve or Resignation	
AKA Bill Elliot	_	nformal Administration ormal Administration	
	C	ase No. <u>2022PR000011</u>	
□ DECLINATION TO SERVE			
 I was named in the will on t	ntative.	nt to serve as	
2. I have not undertaken a	ny duties in this capacit	y.	
3. I decline to serve in this	capacity.		
☐ RESIGNATION			
I am the ☐ personal re☐ testamenta ☐ special adr			
2. I resign for the following	reason(s):		
3. I request that the court a	accept my resignation.		
B. a successor is a			
Form completed by: (Name)		1.	
Mary Smith Address			
555 Blank Street		Signatur	e
Someplace, WI 51111		Albert Elliot Name Printed of	or Typed
Email Address		500 Ninth Street, Sompleace, WI 51	1111
M.Smith.Adress@email.com		Albert.Elliott@email.com	(715) 999-5555
Telephone Number	Bar Number (If any)	Email Address	Telephone Number
(715) 999-9999	N/A	Date	State Bar No. (if any)

PR-1802, 11/19 Declination to Serve or Resignation (Informal Administration and Formal Administration) §§701.17 and 857.21, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

Order Appointing Guardian ad Litem or Attorney

Form No.: GF-131A

<u>Purpose of the Form:</u> Appoints either Guardian ad Litem or Attorney for an individual.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Insert the name of the individual for whom a guardian ad litem or attorney will be appointed.
- Check the appropriate box for either a guardian ad litem or an attorney.
- Enter the name and address of the attorney/person who will be appointed, if known.
- If an attorney is appointed as the guardian ad litem, the fees and expenses shall be paid out of the estate assets.

STATE OF WISCONSIN, CIRCUIT COURT,	, (DECEDENT'S COUNTY) COUNTY
IN THE MATTER OF THE ESTATE OF:	☐ Amended
WILLIAM ELLIOT	Order Appointing
AKA Bill Elliot	Guardian ad Litem or Attorney
	Case No. 2022PR000011
A matter is pending in this court and [Individual(s)] John M a guardian ad litem. an attorney.	Tiller require(s) the appointment of
THE COURT ORDERS:	
Address: 200 First Street, Somplace, WI 511 Telephone Number: (715) 999-1234	11
	ed to be signed.
3. The Petition is denied because	
4. Other:	

GF-131A, 05/16 Order Appointing Guardian ad Litem or Attorney §§48.23, 48.235, 51.60, 54.40, 55.105, 757.52, 757.48, 767.407, 813.123(3)(b), 879.23, and 879.25, Wisconsin Statutes This form shall not be modified. It may be supplemented with additional material.

STATE OF WISCONSIN, CIR	CUIT COURT, (DECED	ENT'S COUNTY) COUNTY	SAMPLE
Case Caption: IN THE MATTER OF THE ESTATE WILLIAM ELLIOTT	OF:	Consent to Act Case No. 2022PR000011	
An Order Appointing Guardian ad	d Litem or Attorney was	filed on [Date] March 1, 2022	
I consent to my appointment as	□ guardian ad litem	attorney for John Miller	
		>	
		Signature	
		George Johnson	
		Name Printed or Ty	ped
		200 First Street, Someplace, WI 51111 Address	
		G.Johnson@email.com	(715) 000 1224
		Email Address	(715) 999-1234 Telephone Number
			N/A
		Date	State Bar No. (if any)

GF-131B, 11/19 Consent to Act

\$\$48.23, 48.235, 51.60, 54.40, 55.105, 757.52, 757.48, 767.407, 813.123(3)(b), 879.23, and 879.25, Wisconsin Statutes This form shall not be modified. It may be supplemented with additional material.

Signature Bond (Estate or Trust Proceedings)

<u>Form No.:</u> <u>PR-1809A</u>

<u>Purpose of Form:</u> Guarantees compliance with the terms of the bond, and is the proposed personal

representative's promise to faithfully perform his or her duties in the

administration of the estate.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Principal and Surety can be either the same individual or separate individuals. The Principal is the
 personal representative. The surety is the individual willing to be personally liable to the estate
 should there be a loss of assets as a result of wrongdoing or mismanagement.
- Insert the amount of bond as determined by the Probate Registrar (based on the estimated value of the estate).
- Check the box which corresponds with your title.
- The Principal must sign where indicated and the signature must be witnessed by two people.
- Any Surety must sign where indicated, in front of a Notary Public.
- In the lower left-hand corner of the form, complete the "Form completed by" box.
- If the bond is approved, the Probate Registrar will complete the remainder of the form.

		CAMPLE
STATE OF WISCONSIN, CIRCUIT COURT, (DEC	EDENT'S COUNTY) COUNTY	SAMPLE
IN THE MATTER OF THE ESTATE OF		
WILLIAM ELLIOT	☐ Amended	
Name	Signature Bond In Estate	
For the following trust:	or Trust Proceedings	
Trust under the Will of William Elliott f/b/o John Miller June 1, 2009 Date of Birth	Case No. <u>2022PR000011</u>	
I/we [Names] Mary Smith		, principal(s)
and [Names] Larry Smith	for which we was set I/we big does / sweet	, surety(ies)
are liable to the Circuit Court in the sum of \$200,000.00 estate(s), jointly and severally.	_ for which payment I/we bind my/ourse	eives and my/our
assignee in summary assignment, to satisfy liabi Other: then this bond obligation shall be void; otherwise it shall Witnessed By: Signature		ted in the estate;
Signature	Signature of Pri	ncipal
Signature	Signature of Pri	ncipal
I, being sworn as a surety, state that I am an adult resid	ent of Wisconsin, residing in	
County. I am financially responsible for the actions of the satisfactory evidence to the designated court officer.	ne principal(s) in the amount of this bond	d. I shall provide
State of	Signature of Sure	
County of	Larry Smith	ety
Subscribed and sworn to before me on	Name Printed or 1	Гуреd
Notary Public/Court Official	111 Westside Steet, Someplace, WI 5 Address	1111
Name Printed or Typed	LSmith@email.com	
My commission/term expires:	Email Address	
$\hfill\square$ This notarial act involved the use of communication technology.	(715) 888-9999 Telephone Number	Date

Form completed by: [Name]			
Mary Smith		Signa	ature of Surety
Address			
555 Blank Street		Nam	e Printed or Typed
Someplace, WI 51111			•
Email Address			Address
M.Smith.Address@email.o	com		
Telephone Number	Bar Number (If any)	Email Address	
(715) 999-9999	N/A		
		Telephone Number	Date

STATE OF WISCONSIN, CIRCUIT COURT, (DECEDENT	<u>'S COUNTY)</u> COUNTY
IN THE MATTER OF THE ESTATE OF	☐ Amended
WILLIAM ELLIOT Name For the following trust:	Court Approval of Signature Bond In Estate or Trust Proceedings
Trust under the Will of William Elliott f/b/o John Miller June 1, 2009	Case No. <u>2022PR000011</u>
A Signature Bond In Estate or Trust Proceedings	was filed on [Date]
Satisfactory evidence as to financial responsibility court officer.	y of surety has been reviewed by the designated
Date Bond Approved:	
DISTRIBUTION: 1. Court 2. Personal Representative/Attorney	

PR-1809B, 02/18 Court Approval of Signature Bond in Estate or Trust Proceedings §701.0702 and Chapters 851 – 879, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

Consent to Serve as Trustee

<u>Form No.:</u> <u>PR-1930</u>

<u>Purpose of Form:</u> To consent to serve as trustee and designate resident agent for nonresident

trustee.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- If you live outside the State of Wisconsin, check the box in No. 3 and fill in the name of the Wisconsin resident you wish to appoint to accept service of process on your behalf if that becomes necessary. This person is then known as the "Resident Agent."
- If you have to appoint a Wisconsin resident as your "Resident Agent," then that person must sign the bottom of this form, including his or her address and the date of signing

Check with the
Office of Register in
Probate to see if you
must sign this form
prior to meeting with
the Registrar or if you
must wait until you
meet with the
Registrar to open the
estate.

In the lower left-hand corner of the form, fill in the "Form completed by" box.

STATE OF WISCONS	IN, CIRCUIT COU	RT, (DECEDENT'S COUNTY)	SAMPLE
IN THE MATTER OF THE I	ESTATE OF	☐ Amended	
WILLIAM ELLIOTT Name For the following trust:		Consent to Serve as Trustee Informal Administration Formal Administration	
Trust under the Will of W. Ell	iott fbo John Miller	Case No. 2022PR000011	
I submit persona may be instituted 2. I will file any req 3. I am a nonreside	ally to the jurisdiction of the second of th	agree to carry out the terms of the truston of the court in any proceeding related person and agree to be bound by the and have applied for letters in this trust.	ing to the trust that e laws of Wisconsin.
		<u> </u>	
		Trustee Mary Smith Name Printed o	r Typed
		555 Blank Street, Somplace, WI 511 Address	
		M.Smith. Address@email.com Email Address Date	(715) 999-9999 Telephone Number N/A State Bar No. (if any)
I accept this appointme	•	otance by Resident Agent	
Form completed by: (Name) Mary Smith		Resident Age	nt
Address 555 Blank Street Someplace, WI 51111		Name Printed o	r Typed
Email Address M.Smith. Address@emai	1.com	Address	
Telephone Number (715) 999-9999	Bar Number (If any)	Email Address	Telephone Number
(113) 777-7777	N/A	Date	State Bar No. (if any)

PR-1930, 11/19 Trustee (Informal Administration and Formal Administration) §§223.105(2) and 223.03(7), Wisconsin Statutes
This form shall not be modified. It may be supplemented with additional material.

Letters of Trust (Issued under Informal Administration)

Form No.: PR-1931

Purpose of Form: Written authority of a Trustee as outlined in a Will to act on behalf of a

testamentary trust in an estate.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Fill in the section after "To:" with the name and address of the Trustee.
- Insert the decedent's date of birth, date of death, county and state.
- In the lower left-hand corner of the form fill in the name, address and telephone number of the Trustee.

Certified copies of the Trust Letters are available for a fee from the Office of Register in Probate.

NOTE: Pursuant to state statute, Letters of Trust must be issued at the same time that Domiciliary Letters are issued.

For the Addition to the extrement	Letters of Trust Informal Administration
Name Cetters of Trust Cetters of Trust	☐ Informal Administration
∑ Informal Administration	tt
For the following trust:	a trust
Trust under the Will of William Elliott f/b/o John Miller Case No. 2022PR000011	
Case No. <u>2022PR000011</u>	Case No. <u>2022PR000011</u>
To: Mary Smith	
555 Blank Street	nith
Computers WI 51111	
he decedent, with date of birth <u>December 30, 1940</u> and date of death <u>January 10, 202</u> 2	nk Street ace, WI 51111 nt, with date of birth December 30, 1940 and date of death January 10, 2022 ,
The decedent, with date of birth December 30, 1940 and date of death January 10, 2022 as domiciled in <a href="(decedent's county) County, State of Wisconsin The decedent's will was admitted to probate. You are granted Letters of Trust with the government of the decedent's will was admitted to probate.	nt, with date of birth December 30, 1940 and date of death January 10, 2022 ed in (decedent's county) County, State of Wisconsin nt's will was admitted to probate. You are granted Letters of Trust with the general
The decedent, with date of birth December 30 , 1940 and date of death <a 2022"="" href="January 10, January 10 , 2022 as domiciled in <a href="(decedent's county) County, State of Wisconsin The decedent's will was admitted to probate. You are granted Letters of Trust with the government of the decedent's will was admitted to probate.	nt, with date of birth December 30, 1940 and date of death January 10, 2022 ed in (decedent's county) County, State of Wisconsin nt's will was admitted to probate. You are granted Letters of Trust with the general duties of trustee(s). You are authorized to administer the trust as required by law.
The decedent, with date of birth December 30, 1940 and date of death January 10, 2022 was domiciled in (decedent's county) County, State of Wisconsin The decedent's will was admitted to probate. You are granted Letters of Trust with the government of trustee(s). You are authorized to administer the trust as required by Mary Smith Address	nt, with date of birth December 30, 1940 and date of death January 10, 2022 ed in (decedent's county) County, State of Wisconsin ht's will was admitted to probate. You are granted Letters of Trust with the general duties of trustee(s). You are authorized to administer the trust as required by law.
The decedent, with date of birth December 30, 1940 and date of death January 10, 2022 as domiciled in (decedent's county) County, State of Wisconsin The decedent's will was admitted to probate. You are granted Letters of Trust with the govern and duties of trustee(s). You are authorized to administer the trust as required by Mary Smith Address 555 Blank Street (COURT SEAL)	and date of death January 10, 2022 and in (decedent's county) County, State of Wisconsin and the general duties of trustee(s). You are authorized to administer the trust as required by law. County, State of (Court SEAL)
The decedent, with date of birth December 30, 1940 and date of death January 10, 2022 was domiciled in (decedent's county) County, State of Wisconsin The decedent's will was admitted to probate. You are granted Letters of Trust with the government of the decedent's of trustee(s). You are authorized to administer the trust as required by Mary Smith Address	and date of death January 10, 2022 The district of the date of birth December 30, 1940 and date of death January 10, 2022 The district of the date of birth December 30, 1940 and date of death January 10, 2022 The district of the date of death January 10, 2022 The district of death January 10,

Demand for Formal Proceedings (Informal Administration)

<u>Form No.:</u> <u>PR-1813</u>

<u>Purpose of Form</u>: To initiate formal proceedings as to a particular issue or the entire subsequent

administration of informal estate proceedings. Sometimes during the

administration of an "informal estate" it becomes necessary for a judge to make a

determination about a specific issue. This form is used to transfer from informal

proceedings to formal proceedings so that a judge can hear the matter.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number.

- Check the appropriate box to indicate whether you are the personal representative for the estate/interested person/representative of interested person/court official.
- Check the appropriate box to indicate whether you are asking the court to determine a particular issue or if you wish for the court to supervise all the remaining proceedings for this estate.

If you are requesting the court to determine a particular issue, provide a complete explanation of your demand and specify the action you are requesting of the court. You may attach additional information to the form, if necessary for a complete explanation.

Sign and date the form at the bottom.

Fill in the "Form completed by" box.

A copy of this Demand must be provided to the Personal Representative who in turn provides a copy to all the interested persons.

Read the Demand carefully regarding suspension of powers of the Personal Representative.

STATE OF WISCONSIN	, CIRCUIT COURT, (DE	ECEDENT'S COUNTY) COUNTY	SAMPLE
IN THE MATTER OF THE E	STATE OF	☐ Amended	
WILLIAM ELLIOT Name	De	emand for Formal Proceeding (Informal Administration)	ys
January 10, 2022		(IIIIOIIIIai AuiiiIIIIStratioii)	
Date of Death		Case No. <u>2022PR000011</u>	
an interes	nal representative in sted person in this es atives of interested ficial.	state.	
2 This matter is pen	ding under informal	administration and I demand for	ormal proceedings for
Iimited issue(s		e estate. ng to the claim of XYZ, Collectio to the Court for a hearing and a de	
		>	
		Signa	ature
		Mary Smith Name Printe	ed or Typed
		555 Blank Street, Someplace, WI	• •
		Addr	
		M.Smith.Address@email.com	(715) 999-9999
		Email Address	Telephone Number
		Date	State Bar No. (if any)
representative. If there is a personal re the powers of t	epresentative, service he personal represe Iministration of this e		on the personal
Form completed by: [Name] Mary Smith			
Address			
555 Blank Street Someplace, WI 51111			
Email Address			
M.Smith.Address@email.com Telephone Number	Bar Number (If any)		
(715) 999-9999	N/A		

PR-1813, 11/19 Demand for Formal Proceedings (Informal Administration) §§865.03 and 865.05(3), Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

Notice of Distribution to Ward

<u>Form No.:</u> <u>PR-1822</u>

<u>Purpose of Form</u>: To notify the court appointing a guardian of the estate of property to be

distributed to the guardian of the estate for the benefit of the guardian's ward. If an incompetent or minor is an heir/beneficiary of the estate, distributions may have to be made to that person's guardian of estate. Consult with the Probate Registrar to determine if this is necessary. If so, you must complete this form and send it to the court appointing the guardian of estate **at least ten (10) days prior**

to the distribution.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number.

- Insert the name of the court which appointed the guardian of estate.
- Insert the name of the guardian of estate.
- Describe the property distributed (cash payment, items of personal property, interest in real estate, etc.).
- Sign and date.

Fill in the "Form completed by" box.

Copies of Notice of
Distribution to Ward must be filed in
both the guardianship and probate
court file.

			SAMPLE
IN THE MATTER OF ES	STATE OF	☐ Amended	
IN THE WATTER OF LO	JIAIL OI	Notice of	
William Elliott		Distribution to Ward	
Name		⊠ Informal	
deceased		Administration	
		Formal Administration	
		Case No. <u>2022PR000011</u>	
To: [Name of Court] <u>Circuit (</u> [Name of Ward] <u>Jane Jor</u>	· ·	onsin the court that appointed the guardian	of estate for
PLEASE TAKE NOTICE	i:		
As personal representati guardian of estate for [Na		s estate proceeding to [Name of guardian of esta the following property:	te] <u>Jacob Jones</u> , See attached
	D	Dramarty	Value
	Description of	Property	value
Cash	Description of	Property	\$38,709.83
Cash	Description of	Property	
Cash	Description of	Property	
		ays prior to the distribution.	
I am providing this notice Form completed by: (Name)		ays prior to the distribution. ▶	\$38,709.83
I am providing this notice Form completed by: (Name) Mary Smith		ays prior to the distribution. ▶ Personal Represe	\$38,709.83
I am providing this notice Form completed by: (Name)		ays prior to the distribution. ▶ Personal Represe	\$38,709.83
Form completed by: (Name) Mary Smith Address 555 Blank Street Someplace, WI 51111		ays prior to the distribution. ▶ Personal Represe	\$38,709.83 entative Typed
Form completed by: (Name) Mary Smith Address 555 Blank Street Someplace, WI 51111 Email Address	e to you at least ten (10) d	Personal Represe Mary Smith Name Printed or 555 Blank Street, Someplace, WI 511 Address	\$38,709.83 Pentative Typed 111
Form completed by: (Name) Mary Smith Address 555 Blank Street Someplace, WI 51111	e to you at least ten (10) d	Personal Represe Mary Smith Name Printed or 555 Blank Street, Someplace, WI 511	\$38,709.83 entative Typed
Form completed by: (Name) Mary Smith Address 555 Blank Street Someplace, WI 51111 Email Address	e to you at least ten (10) d	Personal Represe Mary Smith Name Printed or 555 Blank Street, Someplace, WI 511 Address M.Smith.Address@email.com	\$38,709.83 entative Typed 111 (715) 999-9999

PR-1822, 11/19 Notice of Distribution to Ward (Informal Administration and Formal Administration) §863.43, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material

	Sample Page for Recordkeeping				
0	Estate Account Schedule Letter (A-O)				
	Date of Payment/Receipt	Description and/or Check Number	Dollar Amount		
0					
0					
_					



Links for Other Potentially Required Actions

Employer Identification Number (EIN) is a free service offered by the Internal Revenue Service.

Form: SS-4 Application for Employer Identification Number

<u>Purpose of Form:</u> Use Form SS-4 to apply for an employer identification number (EIN). An EIN is a 9-digit number (for example, 12-3456789) assigned to employers, sole proprietors, corporations, partnerships, estates, trusts, certain individuals, and other entities for tax filing and reporting purposes.

Downloadable forms with instructions (printable and fillable) are available on the web at: https://www.irs.gov/pub/irs-pdf/fss4.pdf

For more information go to:

https://www.irs.gov/businesses/small-businesses-self-employed/how-to-apply-for-an-ein

Probate Claims Notice (F- 13033)

<u>Purpose of Form:</u> To provide written notice to the Department of Health Services and County Clerk of the decedent's date of death and whether the decedent or decedent's spouse received medical assistance. Downloadable forms with instructions (printable and fillable) are available on the web at: https://www.dhs.wisconsin.gov/forms/f1/f13033.pdf

Fiduciary Schedule CC - Request for a Closing Certificate for Fiduciaries

Form: Wisconsin Department of Revenue Schedule CC

<u>Purpose of the Form</u>: To request a Closing Certificate from the Wisconsin Department of Revenue.

Downloadable forms with instructions (printable and fillable) are available on the web at: https://www.revenue.wi.gov/TaxForms2020/2020-ScheduleCCf.pdf

For more information go to https://www.revenue.wi.gov/Pages/FAQS/ise-estate.aspx

Request for Discharge from Personal Liability Internal Revenue Code Section 2204 or 6905

Form: IRS Form 5495 (Rev. 12/2008)

<u>Purpose of the Form</u>: To request from the Internal Revenue Service a discharge, as an "executor" of a decedent's estate, from personal liability for a decedent's income, gift and estate tax deficiencies.

For more information go to https://www.irs.gov/pub/irs-pdf/f5495.pdf