

**JACKSON COUNTY  
REGISTER IN PROBATE/JUVENILE CLERK OFFICE  
307 MAIN STREET, ROOM C207  
BLACK RIVER FALLS WI 54615**

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## **FORMAL ADMINISTRATION**

***NOTE:** This guideline is provided only as a public service and is not meant to be legal advice. The Register in Probate office cannot give legal advice please contact an attorney if you have legal questions.*

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**TO OPEN AN FORMAL ADMINISTRATION:** Complete and file the originals of the following:

- PR – 1901      Petition for Formal Administration
- GF – 131A      Order Appointing Guardian ad Litem (only if needed i.e. minor, incompetent, missing heirs)
- PR – 1803      Waiver, Consent and Approval
- PR – 1807      Consent to Serve
- PR – 1806      Proof of Heirship
- PR – 1903      Order Setting Time to Hear Petition for Administration and Deadline for Filing Claims
- PR – 1905      Order for Formal Administration

**BOND:** May be required before Letters are issued, determination made by the Court. If required, file:

- PR – 1809A      Signature Bond in Estate or Trust Proceedings
- PR – 1809B      Court Approval of Signature Bond in Estate or Trust Proceedings.
  
- PR – 1904      Order Setting Deadline for Filing A Claim
- PR – 1810      Domiciliary Letters
- Original      Will and any Codicils (copy to be provided to all interested persons)
- Original      Affidavit or Proof of Publication from newspaper

**AFTER PR APPOINTMENT:** Complete and file the originals of the following:

- PR – 1811      Inventory **DUE** no later than 4 months after Domiciliary Letters are issued
- Filing Fee      **Statutory inventory filing fee of 0.2% of the assets is due with the Inventory.**
- PR – 1817      Affidavit of Mailing – inventory to interested persons
- PR - 1814      Final Account w/attached schedules
- PR – 1817      Affidavit of Mailing – final account to interested persons
- Note \*\***      Any additional property listed is subject to the 0.2% filing fee

**CLOSING DOCUMENTS:**

- PR – 1910      Petition for Final Judgment
- PR – 1911      Order and Notice for Hearing on Petition for Final Judgment
- PR – 1909      Judgment on Claims
- PR – 1815      Estate Receipt from heirs/beneficiaries for partial and/or full distributions
- PR – 1815      Estate Receipt from claimants, if claims were filed
- PR – 1912      Final Judgment
- PR – 1915      Order Discharging Personal Representative

OTHER DOCUMENTS:

- Original Closing Certificate for Fiduciary from WI Dept of Revenue (see below)

**TRUSTS:** If the decedent's Will establishes a trust, please complete the following forms: PR – 1930 Consent to serve as Trustee and PR – 1829 Letters of Trust and file the Originals with the Register In Probate office when the estate is opened.

**CLAIMS:** It is the Personal Representative's responsibility to check the court record for any claims filed. The website is: <http://wcca.wicourts.gov/index.xsl>. Copies can be obtained from the Register in Probate office for a fee of \$1.00 per page.

**CLOSE ESTATE:** Estate shall be closed 12 months after the Application is filed pursuant to 7<sup>th</sup> Judicial District benchmarks.

**CERTIFIED COPIES:** If requested, are \$3.00 for the certification and \$1.00 for each page copied and compared. If requested through the mail, please enclose a self-addressed, stamped envelope together with the correct fee.

**FORMS:** Additional/duplicate forms can be found at: [www.wicourts.gov](http://www.wicourts.gov).

**WISCONSIN TAX FORMS:** <http://www.dor.state.wi.us/html/formpub.html>

*A Closing Certificate for Fiduciaries is required before closing the estate. Request the Closing Certificate by completing Schedule CC and any other necessary fiduciary tax returned. Submit*

*Schedule CC and any fiduciary returns together with all requested documents to: Wisconsin Department of Revenue, PO Box 8918, Madison, WI 53708-8918. Filing of the fiduciary, estate tax and income tax returns is the personal representative's responsibility.*

**IRS NOTICE:** The Internal Revenue Service may be a creditor of the decedent and should be promptly notified of the death and any probate proceeding. Form 56 – Notice Concerning Fiduciary Responsibility is included with this guideline or can be found at [www.irs.gov](http://www.irs.gov).