

JACKSON COUNTY
REGISTER IN PROBATE/JUVENILE CLERK OFFICE
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BLACK RIVER FALLS WI 54615

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INFORMAL PROBATE

***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.*

TO OPEN AN INFORMAL PROBATE: Complete and file the originals of the following:

FIRST STEP:

- PR – 1801 Application for Informal Administration
- PR – 1806 Proof of Heirship
- PR – 1803 Waiver and Consent
- PR – 1804 Notice to Creditors (OR, if waivers are not files, complete PR – 1805)
- PR – 1805 Notice to Interested Persons and Time Limit for Filing Claims*
- PR – 1807 Consent to Serve
- PR – 1808 Statement of Informal Administration
- PR – 1810 Domiciliary Letters
- Original Will and any Codicils (copy to be provided to all interested persons)
- Original Probate Claims Notice; copy to WI Dept. of Family Services and County Clerk
- Other Trusts – see page 2

**Personal Representative (PR) will be appointed after the hearing date listed on the Notice to Interested Persons once the following documents are filed. Affidavit of Publication from the newspaper and form PR -1817 Affidavit of Mailing showing proof that the Notice was mailed to the interested persons.*

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

SECOND STEP:

INVENTORY

- 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

THIRD STEP:

FINAL ACCOUNT

- 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

FOURTH STEP:

CLOSING DOCUMENTS

- PR – 1815 Estate Receipt from heirs/beneficiaries for partial and/or full distributions
- PR – 1815 Estate Receipt from claimants, if claims were filed
- PR - 1816 Personal Representative’s Statement to Close Estate

OTHER DOCUMENTS:

- Original Affidavit or Proof of Publication from newspaper
- Original Closing Certificate for Fiduciary from WI Dept. of Revenue (see below)

BOND: May be required prior to appointment of the PR; determination will be made whether a bond will be a signature bond (form PR-1809) or a corporate bond.

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 7th 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.

ADDITIONAL RESOURCES: A booklet called "A Personal Representative's Guide to Informal Probate in Wisconsin" is available online at www.wripa.org.

FORMS: Additional/duplicate forms can be found at: 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