

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

ELIZABETH E. STORLIE

Register in Probate/Deputy Juvenile Clerk
715-284-0286

TRISHA RONDORF

Juvenile Clerk/Deputy Register in Probate
715-284-0288

SUMMARY ASSIGNMENT

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 A SUMMARY ASSIGNMENT: Complete and file the originals of the following:

- PR – 1840 Petition for Settlement Assignment
May include Special Administration for issuance of letters
- Filing Fee Statutory inventory filing fee of 0.2% of the assets is due on the value of the Assets or a minimum of \$20.00 if the assets are less than \$10,000.00.
- PR – 1806 Proof of Heirship
- PR – 1846 Waiver and Consent
- PR – 1842 Notice to Creditors for Summary Assignment OR
- PR – 1843 Order and Notice for Hearing on Petition for Summary Assignment
PR-1843 is required IF Waiver and Consents are not or cannot be obtained from all interested parties.
- Original Will and any Codicils (copy to be provided to all interested persons)
- Original Probate Claims Notice

AFTER NOTICE IS PUBLISHED: Complete and file the originals of the following:

1. Deliver Notice to Creditors OR Order and Notice for Hearing on Petition for Summary Assignment to legal newspaper for publication.
 2. Mail the Order and Notice of Hearing on Petition for Summary Assignment to all interested parties.
 3. Mail a copy of Probate Claims Notice to the County Clerk and by certified mail to the WI Department of Health and Family Services.
-
- PR – 1841 Affidavit of Additional Property and/or Creditor for Summary Assignment
If additional assets for found or not listed on Petition, additional filing fee is due.
 - PR-1817 Affidavit of Service or Mailing
 - Original Affidavit or Proof of Publication from newspaper
 - Proof Certified mail return receipt card showing Probate Claims Notice was mailed.
 - PR-1844 Order on Petition for Summary Assignment

TO BE APPOINTED SPECIAL ADMINISTRATOR: Complete the following forms and file with the Summary Assignment Petition:

- PR – 1807 Consent to Serve
- PR – 1852 Order Appointing Special Administrator
- PR – 1853 Letters of Special Administration
A hearing may be required by the court if you are requesting appointment with "all general powers, duties and liabilities as personal representative". If you are

requesting “specific powers”, a hearing is usually not necessary, but may also be required by the Court.

TO CLOSE THE SPECIAL ADMINISTRATION: Complete and file the originals of the following:

- PR – 1815 Estate Receipt (from heirs/beneficiaries or claimants)
- PR – 1854 Petition for Discharge of Special Administrator
- PR – 1855 Order Discharging Special Administrator

CERTIFIED COPIES: \$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.

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.

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

FORMS: Additional/duplicate forms can be found at: www.wicourts.gov.