

**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.*

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 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.

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.