

MENOMINEE COUNTY PROBATE COURT

Menominee County Courthouse

839 10th Avenue

Menominee, MI 49858

Phone: (906) 863-2634

Fax: 906-863-9904

TDD (Michigan Relay Center): 1-800-649-3777

Daniel E. Hass

Judge of Probate & Family Court Judge

PROBATE COURT & FAMILY COURT FILING OF PLEADINGS & OTHER PAPERS

COURT RULE 5.113 PAPERS; FORM AND FILING MCR 2.113

Fees: \$175.00 filing fee.

An application, petition, motion, inventory, report, account, or other paper in a proceeding must be legibly typewritten or printed, in ink; in the English language; and must include:

The name of the court.

Title of the proceeding in which it is filed.

Case number, if any, including a prefix of the year filed and the two letter suffix for the cast type code.

Character (name) of the paper.

Name, address, and telephone number of the attorney, if any, appearing for the person filing the paper.

Be substantially in the form approved by the State Court Administrator, if a form has been approved for the use.

Any non-conforming papers may not be accepted for filing.

STATE OF MICHIGAN PROBATE COURT Menominee COUNTY	APPLICATION FOR INFORMAL PROBATE AND/OR APPOINTMENT OF PERSONAL REPRESENTATIVE (TESTATE/INTESTATE)	CASE NO. and JUDGE Honorable Daniel E. Hass P37233
Court address Probate Court, 839 10th Avenue, Menominee, MI. 49858		Court telephone no. (906) 863-2634

In the matter of _____
 First, middle, and last name

Applicant's name, address and telephone no.

Applicant's attorney, bar no., address, and telephone no.

1. I, _____, am interested in the estate and make this application as
 Name of applicant

Relationship to decedent, i.e., heir, devisee, child, spouse, creditor, beneficiary, etc.
 2. Decedent information: _____
 Date of death Time (if known) Date of birth

Put DOB in Ref. No. row 1 on MC 97.

XXX-XX- Put last 4 digits of SSN in Ref. No. row 2 on MC 97.
 Last four digits of SSN

Domicile (at date of death): _____
 City/Township/Village County State

3. A death certificate has been issued, and a copy accompanies this application as a separate document.
 No death certificate is available. Attached is alternative documentation of the decedent's death.

4.a. As far as I know or could ascertain with reasonable diligence, the names and addresses of the spouse, children, devisees, and heirs of the decedent, and other interested persons, the relationship to the decedent, and the ages of any who are minors are:

(Required testimony forms are attached.)

NAME	ADDRESS	RELATIONSHIP*	AGE (if minor)**
	Street address		
	City State Zip		
	Street address		
	City State Zip		
	Street address		
	City State Zip		
	Street address		
	City State Zip		

*Specify spouse, child, devisee, or heir.
 **If person is a minor, provide the date of birth on form MC 97a and put the Ref. No. from that form in the box above with the age.

4.b. Of the interested persons listed above, the following are under legal disability or otherwise represented and presently have or will require representation:

NAME	LEGAL DISABILITY	REPRESENTED BY Name, address, and capacity

5. a. Venue is proper in this county because the decedent was domiciled in this county on the date of death.
 b. The decedent was not domiciled in Michigan, but venue is proper in this county because property of the decedent was located in this county at the date of death.

6. a. The decedent died intestate and after exercising reasonable diligence, I am unaware of any unrevoked testamentary instrument relating to property located in this state as defined under MCL 700.1301.
 b. I am aware of an unrevoked testamentary instrument relating to property located in this state as defined under MCL 700.1301, but the instrument is not being probated because (if this statement is true, the probate register must deny this application according to MCL 700.3311): _____
 The instrument is attached to this application. is already in the court's possession.

c. The decedent's will, dated _____, with codicil(s) dated _____, is/are offered for probate and is/are attached to this application. is/are already in the court's possession.

d. An authenticated copy of the will and codicil(s), if any, probated in _____ County, _____ State is/are offered for probate, and documents establishing its probate are attached to this application.

7. To the best of my knowledge, I believe that the instrument(s) subject to this application, if any, was/were validly executed and is the decedent's last will. After exercising reasonable diligence, I am unaware of an instrument revoking the will or codicil(s).

8. A personal representative has been previously appointed in _____ County, _____ State and the appointment has not been terminated. The personal representative's name and address are:

Name _____ Address _____
 City _____ State _____ Zip _____

9. I nominate _____ as personal representative, who is qualified and has the following priority for appointment: _____. His/her address is: _____

City _____ State _____ Zip _____

10. Other persons have prior or equal right to appointment as personal representative. They are:

Name _____ Name _____
 Name _____ Name _____

Suitable renunciations, nominations, and/or a Notice of Intent to Seek Informal Appointment and proof of its service have been or will be filed.

11. The will expressly requests that the personal representative serve with bond.
12. A special personal representative is necessary because _____
- _____

I REQUEST:

13. Informal probate of the will.
14. Informal appointment of the nominated personal representative with without bond.
15. The appointment of a special personal representative pending the appointment of the nominated personal representative.

I declare under the penalties of perjury that this application has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Date

Applicant signature

Date

Attorney signature

STATE OF MICHIGAN PROBATE COURT COUNTY Menominee	TESTIMONY TO IDENTIFY HEIRS	CASE NO. and JUDGE Honorable Daniel E. Hass P37233
Court address Probate Court, 839 10th Avenue, Menominee, MI. 49858		Court telephone no. (906) 863-2634

In the matter of _____
First, middle, and last name of decedent

1. My name is _____ . My address is _____

2. I am related to the decedent (or know his/her family) as follows: _____

3. The date and time of the death of the decedent is _____ and at that time the
decedent's domicile (residence) was _____
Date Time Address

NOTE: IN THE FOLLOWING QUESTIONS, TREAT ALL PERSONS WHO DIED WITHIN 120 HOURS AFTER THE DECEDENT AS IF THEY DID NOT SURVIVE THE DECEDENT. List persons who died within 120 hours after the decedent in item 14 below.

4. The decedent did not leave a surviving spouse.
 left a surviving spouse named _____

5. a. The decedent had the following children, both natural (born in or out of wedlock) and adopted:

 b. Of the children listed in 5a, the following are no longer heirs due to their adoption by someone other than a stepparent: _____
 c. Of the children listed in 5a, the following were not children of the surviving spouse: _____

Answer question 6 only if question 5a was checked.

6. a. The following children listed in 5a died before the decedent: _____

 b. Children listed in 6a left their own children (either natural or adopted) or left grandchildren from one or more of their own predeceased children who survived the decedent. The names of these descendants and the name of the child in 6a to whom they are related are as follows:

 c. Of the persons listed in 6b, the following are no longer heirs due to their adoption by someone other than a stepparent: _____

If decedent left no surviving descendant, complete 7.

7. The decedent did not leave a surviving parent. left a surviving parent named _____

If decedent is not survived by spouse, descendants, or parents, complete 8 (and 9, if applicable).

8. The decedent did not leave surviving brothers or sisters. left the following brothers or sisters, either natural or adopted, whole blood or half blood, who were not adopted by others and who survived the decedent:

9. One or more of the brothers and sisters of the decedent died before him/her leaving descendants, either natural or adopted, who were not adopted by others and who survived the decedent. The names of these descendants, and the name(s) of their deceased ancestor are _____

If decedent was not survived by spouse, descendants, parent, brother, or sister or children of deceased brother or sister, complete 10 (and 11, if applicable).

10. The decedent did not leave surviving grandparents. left surviving grandparents (both maternal and paternal) named _____

11. Both maternal grandparents and/or both paternal grandparents died before decedent. Their surviving descendants and their relationships to the grandparents are

Maternal grandparents: _____

Paternal grandparents: _____

12. The following heirs listed above are under legal disability and are currently living. Their name(s), legal disability, and name(s) of their representative(s) are _____

13. The following deceased heirs survived the decedent by more than 120 hours. Their name(s) and the name(s) of those who represent decedent's interests are _____

14. The following persons identified above did not survive the decedent by 120 hours. Their names, relationships to decedent, and the date and time of their deaths are:

NAME	RELATION	DATE OF DEATH	TIME OF DEATH

STATE OF MICHIGAN JUDICIAL DISTRICT JUDICIAL CIRCUIT COUNTY PROBATE	PROTECTED PERSONAL IDENTIFYING INFORMATION	CASE NO. and JUDGE Honorable Daniel E. Hass P37233
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Menominee. Court address Court telephone no.
 Probate Court, 839 10th Avenue, Menominee, MI. 49858 (906) 863-2634

Plaintiff's/Petitioner's name	v	Defendant's/Respondent's name
In the matter of _____		

This form is nonpublic because it contains personal identifying information (PII) that is protected from public inspection under MCR 1.109(D)(9)(a). Use this form to provide PII only for a person who is a defendant, respondent, or decedent. If the person is a plaintiff, petitioner, or other individual, use form MC 97a.

Instructions:

- When PII (such as date of birth) must be filed with the court on a public document, DO NOT include it on that public document. Instead, you must provide it on this form.
- **Provide only** the protected PII required for your particular case. For example, if you are filing a public document that requires you to provide a date of birth to the court, complete only that field on this form.

Name of form/document that this MC 97 is being filed with: _____

Printed name of individual completing form and date _____

Instructions: Provide the name of the person that the PII applies to, followed by the specific PII that is required to be provided. For Other, specify the type of PII in addition to the PII itself. Use the below reference number (Ref. No.) in the public document in place of the protected PII. For example, insert "Ref. No. 1" in place of the DOB in the public document.

Ref. No.	Name (required)
1	Date of birth
2	National ID no. / Last 4 digits of SSN XXX-XX-_____
3	Driver's License / State-issued ID no.
4	Passport no.
5	Other

Ref. No.	Instructions: List the name of the financial institution and the account number. List the paragraph that references the account, if needed for clarity. Use reference number (Ref. No.) when necessary to refer to account in public documents.		
6	Financial institution	Account no.	Paragraph no.
7	Financial institution	Account no.	Paragraph no.
8	Financial institution	Account no.	Paragraph no.
9	Financial institution	Account no.	Paragraph no.

STATE OF MICHIGAN JUDICIAL DISTRICT JUDICIAL CIRCUIT COUNTY PROBATE Menominee Court address Probate Court, 839 10th Avenue, Menominee, MI. 49858	ADDENDUM TO PROTECTED PERSONAL IDENTIFYING INFORMATION	CASE NO. and JUDGE Honorable Daniel E. Hass P37233 Court telephone no. (906) 863-2634
Plaintiff's/Petitioner's name		v
Defendant's/Respondent's name		
In the matter of _____		

This form is nonpublic because it contains personal identifying information (PII) that is protected from public inspection under MCR 1.109(D)(9)(a). Use this form to provide PII only for a person who is a NOT a defendant, respondent, or decedent. If the person is a defendant, respondent, or decedent use form MC 97.

Instructions:

- When PII (such as date of birth) must be filed with the court on a public document, **DO NOT** include it on that public document. Instead, you must provide it on this form.
- **Provide only** the protected PII required for your particular case. For example, if you are filing a public document that requires you to provide a date of birth to the court, complete only that field on this form.

Name of form/document that this MC 97a is being filed with: _____

Printed name of individual completing form and date _____

Ref. No.	Instructions: Provide the name of the person that the PII applies to, followed by the specific PII that is required. For Other, specify the type of PII in addition to the PII itself - for example, Social Security No. XXXX. Use the below reference number (Ref. No.) in the public document in place of the protected PII. For example, insert "Ref. No. XX" in place of the DOB in the public document.		
10	Name	DOB	Other
11	Name	DOB	Other
12	Name	DOB	Other
13	Name	DOB	Other
14	Name	DOB	Other
15	Name	DOB	Other
16	Name	DOB	Other
17	Name	DOB	Other
18	Name	DOB	Other

STATE OF MICHIGAN
PROBATE COURT
COUNTY OF Menominee

NOTICE OF INTENT TO REQUEST
INFORMAL APPOINTMENT OF
PERSONAL REPRESENTATIVE

FILE NO.

Estate of _____

I, _____, intend to request my informal appointment
Name as personal representative of the estate. A copy of the application is attached. This notice is being served upon each person whose right to an appointment is prior or equal to my own. The court will not act upon my application until 14 days after the date this notice was mailed or until 7 days after this notice was personally served.

The actions you may take include:

- Upon paying a filing fee, filing a petition for formal proceedings to appoint a personal representative.
- Upon paying a filing fee, filing an application for informal appointment of yourself as personal representative provided you have a higher priority to be appointed.
- Contacting an attorney for assistance in representing you in any proceeding you wish to file in the court.

The court will not be able to provide you with any legal advice in completing or filing the forms.

Date

Attorney name Bar no.

Applicant signature

Address

Address

City, state, zip Telephone no.

City, state, zip Telephone no.

NOTICE TO APPLICANT: You must attach this notice and a proof of service to the application for informal appointment when you file it with the court. If you are unable to serve an interested person because the address or whereabouts of that interested person is unknown, you must publish notice by using form PC 563a.

Do not write below this line - For court use only

STATE OF MICHIGAN PROBATE COURT Menominee COUNTY	ACCEPTANCE OF APPOINTMENT	CASE NO. and JUDGE Honorable Daniel E. Hass P37233
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Court address Probate Court, 839 10th Avenue, Menominee, MI. 49858	Court telephone no. (906) 863-2634
--	--

In the matter of _____
First, middle, and last name

1. I have been appointed _____ of the person/estate.
Type of fiduciary

2. I accept the appointment, submit to personal jurisdiction of the court, and agree to file reports and to perform all required duties.

3. For a period of _____ days from the date of my appointment, I exclude from the scope of my responsibility
not to exceed 91 days

the following real estate or ownership interest in a business entity: _____
Describe real property or business interest

because I reasonably believe the real estate or other property owned by the business entity is or may be contaminated by a hazardous substance, or is or has been used in an activity directly or indirectly involving a hazardous substance that could result in liability to the estate or otherwise impair the value of property held by the estate.

 Date

 Signature

 Attorney name (type or print)

 Bar no. Name (type or print)

 Attorney Address

 Address

 City, state, zip Telephone no.

 City, state, zip Telephone no.

Put DOB in row 10 on MC 97a.

 Date of birth

STATE OF MICHIGAN
PROBATE COURT
COUNTY OF Menominee

NOTICE OF APPOINTMENT AND
DUTIES OF PERSONAL REPRESENTATIVE

FILE NO.

Estate of _____

TO ALL INTERESTED PERSONS:

1. On _____ I was appointed personal representative as requested in the application or petition for probate of
Date
this estate (copy attached unless previously sent). I am serving without bond. with bond in the amount of \$ _____.

The papers related to the estate are on file with the _____ County Probate Court located at

Address. This is is not a supervised administration.

2. Attached is a copy of the will of the decedent which was was not admitted to probate and under which I will administer, manage, and distribute the estate.

3. The court does not supervise the personal representative in the administration of an estate except in limited circumstances.

4. If I was appointed informally, you or another interested person may petition the court objecting to my appointment and/or demanding that I post a bond or an additional bond. The petition must be filed with the probate court along with the applicable fee. Unless the court grants the petition, I will continue to serve as appointed.

5. You or another interested person may petition for a hearing by the court on any matter at any time during the administration of the estate, including for distribution of assets and allowance of expenses of administration. The petition must be filed with the probate court along with the applicable fee.

6. If you continue to be an interested person (such as an heir of an intestate estate or devisee or beneficiary under the will of the decedent), I will provide you with: 1) a copy of the inventory within 91 days of my appointment; 2) unless waived by you, a copy of an account including fiduciary fees and attorney fees charged to the estate, within 1 year of my appointment; and 3) a copy of the closing statement or settlement petition when the estate is ready for closing.

7. To avoid penalties, I must have paid any federal estate and Michigan estate taxes within 9 months after the date of the decedent's death or another time period specified by law.

8. The estate may not be closed earlier than 5 months after the date of my appointment except in limited circumstances. If the estate is not settled within 1 year after my appointment, within 28 days after the anniversary of the appointment, I must file with the court and send to each interested person a notice that the estate remains under administration and the reason for the continuation of the estate. If you do not receive such a notice, you may petition the court for a hearing on the necessity for continued administration or for closure of the estate.

Date of notice

Attorney name Bar no.

Name

Address

Address

City, state, zip Telephone no.

City, state, zip Telephone no.

ATTENTION: The above duties are not the only duties required of the personal representative. This notice of appointment must be served on all interested persons within 14 days after the appointment of the personal representative.

Do not write below this line - For court use only

STATE OF MICHIGAN
PROBATE COURT
COUNTY OF

RENUNCIATION OF RIGHT TO APPOINTMENT,
NOMINATION OF PERSONAL
REPRESENTATIVE AND WAIVER OF NOTICE

FILE NO.

Estate of _____

- 1. I, _____, have a prior or equal right to appointment as personal representative.
Name (type or print)
- 2. I renounce that right.
- 3. I have the right to nominate and I nominate and request the appointment of _____
as personal representative. Name (type or print)
- I renounce my right to nominate a qualified person to act as personal representative.
- 4. I waive notice of the appointment.

_____	_____	_____	_____
Attorney name (type or print)	Bar no.	Signature	Date
_____	_____	_____	_____
Address	Address	_____	_____
_____	_____	_____	_____
City, state, zip	Telephone no.	City, state, zip	Telephone no.

NOTE: A person with priority as determined by a probated will, including a person nominated by a power conferred in the will, does not through this priority have the power to nominate another to be personal representative.

Do not write below this line - For court use only

STATE OF MICHIGAN PROBATE COURT Menominee COUNTY	NOTICE TO CREDITORS Decedent's Estate	CASE NO. and JUDGE Honorable Daniel E. Hass P37233
Court address Probate Court, 839 10th Avenue, Menominee, MI. 49858		Court telephone no. (906) 863-2634

Estate of _____ Date of birth: * _____
First, middle, and last name

***NOTE TO PREPARER:** If a copy of this form is filed with the court, you **must** redact the date of birth from the copy being filed as required by court rule.

TO ALL CREDITORS:**

NOTICE TO CREDITORS: The decedent, _____, died _____
Date

Creditors of the decedent are notified that all claims against the estate will be forever barred unless presented to _____, personal representative, or to both the probate

court at 839 10th Avenue, Menominee, MI. 49858
Address City

and the personal representative within 4 months after the date of publication of this notice.

_____		_____	
<small>Attorney name (type or print)</small>		<small>Personal representative name (type or print)</small>	
_____		_____	
<small>Address</small>		<small>Address</small>	
_____	_____	_____	_____
<small>City, state, zip</small>	<small>Telephone no.</small>	<small>City, state, zip</small>	<small>Telephone no.</small>

PUBLISH ABOVE INFORMATION ONLY

Publish one time in _____ in _____ County
Name of publication

Furnish _____ copies to _____

Furnish affidavit of publication to the probate court with copy to _____

Forward statement for publication charges to _____

****NOTE TO PREPARER:** If there is a known creditor whose address is unknown and cannot be ascertained after diligent inquiry, insert "including [name of creditor] whose address and whereabouts are unknown."

STATE OF MICHIGAN
PROBATE COURT
COUNTY OF Menominee

NOTICE TO KNOWN CREDITORS

FILE NO.

Estate of _____

TO: _____

Name

Address

City, state, zip

The fiduciary believes you may be a creditor of the estate. The attached notice to creditors was published _____
Date

You have four months from the above date of publication or one month from the date this notice is sent to you, whichever is later, to present your written claim or it will be forever barred. You may use the Statement and Proof of Claim (form PC 579) to submit your claim. The written claim must be timely delivered or mailed to the fiduciary listed below. You may also send it to the probate court for filing along with a filing fee of \$20.00. You may also commence a suit against the estate in a court.

_____ Date

_____ Name of fiduciary to whom claim should be presented

_____ Attorney name (type or print) Bar no.

_____ Title

_____ Address

_____ Address

_____ City, state, zip Telephone no.

_____ City, state, zip

PROOF OF SERVICE

I certify that on _____, I served a copy of this notice on the creditor by
Date

- personal delivery to the creditor.
- mailing, with postage prepaid, to the address indicated in this notice.

I declare under the penalties of perjury that this proof of service has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

_____ Date

_____ Signature

Do not write below this line - For court use only

<p style="text-align: center;">STATE OF MICHIGAN PROBATE COURT COUNTY</p> <p>Menominee</p>	<p>INVENTORY <input type="checkbox"/> AMENDED (DECEDENT ESTATE)</p>	<p>CASE NO. and JUDGE</p> <p>Honorable Daniel E. Hass P37233</p>
<p>Court address</p> <p>Probate Court, 839 10th Avenue, Menominee, MI. 49858</p>		<p>Court telephone no.</p> <p>(906) 839-2634</p>

In the matter of _____
First, middle, and last name of decedent

Personal representative's name, address, and telephone no.

Personal representative's attorney, bar no., address, and telephone no.

I, _____, personal representative, submit the following as a
Name (type or print)
complete and accurate inventory of all the assets of the estate and the fair market valuations as of _____
Date of death

PERSONAL PROPERTY AND REAL PROPERTY DESCRIPTION If property has been used to secure a loan (including an equity line of credit), show the nature and amount of the lien. Definitions and instructions for completing the inventory are on page 2 of this form. The values of all property are calculated as of the decedent's date of death. *For real property only, if the date of death is on or after March 28, 2013, the gross value of a parcel can be reduced by any lien amount on that parcel; however, the remaining inventory value of that parcel cannot be less than zero. For personal property, the gross value and inventory value are the same. (Attach separate sheet if necessary.)

Legal description of real property	Gross value	Lien amount	Inventory value (less lien)*
Legal description of real property	Gross value	Lien amount	Inventory value (less lien)*
Description of personal property	Gross value	Lien amount	Inventory value
Description of personal property	Gross value	Lien amount	Inventory value
Description of personal property	Gross value	Lien amount	Inventory value
Description of personal property	Gross value	Lien amount	Inventory value
Description of personal property	Gross value	Lien amount	Inventory value
Totals	Total Gross Value		Total Inventory Value

I declare under the penalties of perjury that this inventory has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Date

Attorney signature

Signature

DEFINITIONS:

- **Real property** means land, including a building or house that is built on the land.
- **Personal property** means everything that a person owns except real property. Personal property includes bank accounts and checking accounts.

INSTRUCTIONS TO COMPLETE THE INVENTORY:

1. List all real and personal property in the column "**Personal Property and Real Property Description.**"
2. When listing real property, provide the legal description of the property and the name of any other owner.
 - a. If real property has been used to secure a loan (including an equity line of credit), show the nature and amount of the lien, and reduce the gross value (value as of date of death) by the amount of the lien, but the inventory value cannot be less than zero.
 - b. If the value of real property is determined by an appraisal, include the appraiser's name and address and a description of the property appraised.
 - c. If this form is filed in a guardianship, real property that the ward owns jointly or in common with others must be listed along with the type of ownership. The court may require additional information to support the value of property that is stated in the inventory.
 - d. For each parcel of real property, calculate the value individually.
3. When listing personal property, provide enough detail to adequately determine the value. Some items should be listed separately and some items should be combined under one category. Provide the name and address of each financial institution listed. The address of a financial institution shall be either that of the institution's main headquarters or the branch used most frequently by the personal representative.

Do not provide financial account numbers on this form. If an account number is necessary to distinguish between accounts, put it on form MC 97.

a. Examples of items that should be listed and valued separately are:

- Automobiles
- Jewelry
- Bank accounts
- Antiques
- Any other individual item of high value
- Life insurance if payable to the estate
- Annuities
- Mutual funds
- Stocks and bonds

b. Examples of items that can be listed in categories are household items such as dishes, flatware, curtains, linens, utensils, clothing, furnishings, etc. These items can be grouped into several categories or combined into one category.

c. If personal property has been used to secure a loan, show the nature and amount of the lien, but do not deduct the lien amount from the gross value (value as of the date of death) of any item of personal property.

d. If the value of personal property is determined by an appraisal, include the appraiser's name and address and a description of the property appraised.

e. If this form is filed in a guardianship, personal property that the ward owns jointly or in common with others must be listed along with the type of ownership. The court may require additional information to support the value of property that is stated in the inventory.

STATE OF MICHIGAN PROBATE COURT COUNTY Menominee	ACCOUNT OF FIDUCIARY, SHORT FORM <input type="checkbox"/> _____ Annual <input type="checkbox"/> Final <input type="checkbox"/> Interim Number <input type="checkbox"/> AMENDED	CASE NO. and JUDGE Honorable Daniel E. Hass P37233
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Court address Probate Court, 839 10th Avenue, Menominee, MI. 49858	Court telephone no. (906) 863-2634
--	--

In the matter of _____
First, middle, and last name

In a guardianship or conservatorship, the ward's or protected individual's current address and telephone number are:

1. I, _____, am the _____
Name Title
 of the estate and submit the following as my account, which covers the period from _____
Month, day, year
 to _____ (may not exceed 12 months).
Month, day, year

Note: Do not put financial account numbers on this form. If an account number is necessary to distinguish between accounts, put it on form MC 97.

COLUMN 1. INCOME, GAIN, AND OTHER RECEIPTS		COLUMN 2. EXPENSES, LOSSES, AND OTHER DISBURSEMENTS	
	\$		\$
Investment gain		Investment loss	
Total Column 1		Total Column 2	
(Enter on line 2.b on page 2.)		(Enter on line 2.d on page 2.)	

- 2. a. Balance on hand from last account, or value of inventory, if first account..... \$ _____
 - b. Enter Total Column 1, Income, Gain, and Other Receipts, from page 1 of this form..... \$ _____
 - c. **Subtotal** (Add line 2.a to line 2.b and enter the amount here)..... \$ _____
 - d. Enter Total Column 2, Expenses, Losses, and Other Disbursements, from page 1 of this form..... \$ _____
 - e. Balance of assets on hand (Subtract line 2.d from line 2.c and enter the amount here.)..... \$ _____
- This line must equal the last line in item 3. (Itemize assets below.)

3. The balance of assets on hand are as follows:

ITEMIZED ASSETS REMAINING AT END OF ACCOUNTING PERIOD	
	\$
Total balance on hand. This line must equal the last line in item 2.	\$

NOTE: In guardianships and conservatorships, except as provided by MCR 5.409(C)(4), you must present to the court copies of corresponding financial institution statements or you must file with the court a verification of funds on deposit, either of which must reflect the value of all liquid assets held by a financial institution dated within 30 days after the end of the accounting period.

4. The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, except as follows: (For each person whose address changed, list the name and new address; attach separate sheet if necessary.)

- 5. This account lists all income and other receipts and expenses and other disbursements that have come to my knowledge.
- 6. This account is not being filed with the court.
- 7. My fiduciary fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$ _____. Attached is a written description of the services performed.
- 8. Attorney fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$ _____. Attached is a written description of the services performed.

I declare under the penalties of perjury that this account has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

	Date
Attorney signature	Fiduciary signature
Attorney name (type or print)	Fiduciary name (type or print)
	Bar no.
Address	Address
City, state, zip	City, state, zip
Telephone no.	Telephone no.

(For accounts that must be filed with the court.)

NOTICE TO INTERESTED PERSONS

- 1. You must bring to the court's attention any objection you have to this account. Except in guardianships and conservatorships, the court does not normally review the account without an objection.
- 2. You have the right to review proofs of income and disbursements at a time reasonably convenient to the fiduciary and yourself.
- 3. You may object to all or part of an accounting by filing a written objection with the court before the court allows the account. You must pay a \$20.00 filing fee to the court when you file the objection. (See MCR 5.310[C].)
- 4. If an objection is filed and is not otherwise resolved, the court will conduct a hearing on the objection.
- 5. You must serve the objection on the fiduciary or his/her attorney.

STATE OF MICHIGAN PROBATE COURT Menominee COUNTY	SWORN STATEMENT TO CLOSE UNSUPERVISED ADMINISTRATION <input type="checkbox"/> SUPPLEMENTAL	CASE NO. and JUDGE Honorable Daniel E. Hass P37233
Court address Probate Court, 839 10th Avenue, Menominee, MI. 49858		Court telephone no. (906) 863-2634

In the matter of _____
 First, middle, and last name

1. I am the personal representative of this estate. Upon filing this sworn statement with the court, this estate will be closed without a hearing. More than five months have passed since the date of the appointment of the original personal representative.
2. If required by law or court rule, I have published notice to creditors, and the time for presentment of claims has expired.
3. I have fully administered this estate by paying, settling, or disposing of the claims that were presented, the estate and administration expenses, and all other taxes. I have distributed the assets of the estate to the persons entitled to the assets.*
4. The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, except as follows:

(Check only one box, as appropriate.)

5. a. The decedent died before October 1, 1993, and no Michigan inheritance tax is due. A certificate of no inheritance tax liability from the Michigan Department of Treasury is attached or has been filed.
- b. The decedent died on October 1, 1993, or later and no Michigan estate tax is due.
- c. Michigan estate or inheritance tax has been paid in full. (Evidence of full payment from Michigan Department of Treasury is attached or has been filed.)
6. I sent a copy of this sworn statement to all distributees and to all claimants whose claims are neither paid nor barred and to all demandants. I furnished a full account in writing to the distributees whose interests are affected by the administration.
7. I reopened the estate and have completed the administration.

I declare under the penalties of perjury that this Sworn Statement to Close Unsupervised Administration has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

 Personal representative signature Address

 Personal representative name (type or print) City, state, zip Telephone no.

 Attorney signature Address

 Attorney name (type or print) Bar no. City, state, zip Telephone no.

***Note:** Specify any exceptions. If any claims remain undischarged, state whether the estate was distributed subject to possible liability with the agreement of the distributees, or state in detail other arrangements that were made to accommodate outstanding liabilities.

NOTICE TO INTERESTED PERSON(S): You may object to this sworn statement by filing written objections with the probate court mentioned above along with a \$20 filing fee. If an objection is not filed within 28 days after this sworn statement is filed with the court, the probate register will issue a certificate stating that it appears that I have fully administered this estate. The certificate does not preclude any action against me or the surety on a bond I may have obtained. If an action or proceeding involving me is not pending in this court one year after this sworn statement is filed, my appointment ends.

STATE OF MICHIGAN
PROBATE COURT
COUNTY OF Menominee

LETTERS OF AUTHORITY FOR
PERSONAL REPRESENTATIVE

FILE NO.

Estate of _____

TO:

Name and address

Telephone no.

You have been appointed and qualified as personal representative of the estate on _____ . You are authorized to perform all acts authorized by law unless exceptions are specified below. Date

Your authority is limited in the following way:

You have no authority over the estate's real estate or ownership interests in a business entity that you identified on your acceptance of appointment.

Other restrictions or limitations are:

These letters expire: _____
Date

Date Judge (formal proceedings)/Register (informal proceedings) Bar no.

SEE NOTICE OF DUTIES ON SECOND PAGE

Attorney name (type or print) Bar no.

Address

City, state, zip Telephone no.

I certify that I have compared this copy with the original on file and that it is a correct copy of the original, and on this date, these letters are in full force and effect.

Date Deputy register

Do not write below this line - For court use only

The following provisions are mandatory reporting duties specified in Michigan law and Michigan court rules and are not the only duties required of you. See MCL 700.3701 through MCL 700.3722 for other duties. Your failure to comply may result in the court suspending your powers and appointing a special fiduciary in your place. It may also result in your removal as fiduciary.

CONTINUED ADMINISTRATION: If the estate is not settled within 1 year after the first personal representative's appointment, you must file with the court and send to each interested person a notice that the estate remains under administration, specifying the reasons for the continued administration. You must give this notice within 28 days of the first anniversary of the first personal representative's appointment and all subsequent anniversaries during which the administration remains uncompleted. If such a notice is not received, an interested person may petition the court for a hearing on the necessity for continued administration or for closure of the estate. [MCL 700.3703(4), MCL 700.3951(3), MCR 5.144, MCR 5.307, MCR 5.310]

DUTY TO COMPLETE ADMINISTRATION OF ESTATE: You must complete the administration of the estate and file appropriate closing papers with the court. Failure to do so may result in personal assessment of costs. [MCR 5.310]

CHANGE OF ADDRESS: You are required to inform the court and all interested persons of any change in your address within 7 days of the change.

Additional Duties for Supervised Administration

If this is a supervised administration, in addition to the above reporting duties, you are also required to prepare and file with this court the following written reports or information.

INVENTORY: You are required to file with the probate court an inventory of the assets of the estate within 91 days of the date your letters of authority are issued or as ordered by the court. You must send a copy of the inventory to all presumptive distributees and all other interested persons who request it. The inventory must list in reasonable detail all the property owned by the decedent at the time of death. Each listed item must indicate the fair market value at the time of the decedent's death and the type and amount of any encumbrance. Where the decedent's date of death is on or after March 28, 2013, the lien amount will be deducted from the value of the real property for purposes of calculating the inventory fee under MCL 600.871(2). If the value of any item has been obtained through an appraiser, the inventory should include the appraiser's name and address with the item or items appraised by that appraiser. You must also provide the name and address of each financial institution listed on your inventory at the time the inventory is presented to the court. The address for a financial institution shall be either that of the institution's main headquarters or the branch used most frequently by the personal representative. [MCL 700.3706, MCR 5.307, MCR 5.310(E)]

ACCOUNTS: You are required to file with this court once a year, either on the anniversary date that your letters of authority were issued or on another date you choose (you must notify the court of this date) or more often if the court directs, a complete itemized accounting of your administration of the estate. This itemized accounting must show in detail all income and disbursements and the remaining property, together with the form of the property. Subsequent annual and final accountings must be filed within 56 days following the close of the accounting period. When the estate is ready for closing, you are also required to file a final account with a description of property remaining in the estate. All accounts must be served on the required persons at the same time they are filed with the court, along with proof of service.

ESTATE (OR INHERITANCE) TAX INFORMATION: You are required to submit to the court proof that no estate (or inheritance) taxes are due or that the estate (or inheritance) taxes have been paid. **Note:** The estate may be subject to inheritance tax.

Additional Duties for Unsupervised Administration

If this is an unsupervised administration, in addition to the above reporting duties, you are also required to prepare and provide to all interested persons the following written reports or information.

INVENTORY: You are required to prepare an inventory of the assets of the estate within 91 days from the date your letters of authority are issued and to send a copy of the inventory to all presumptive distributees and all other interested persons who request it. The inventory must list in reasonable detail all the property owned by the decedent at the time of death. Each listed item must indicate the fair market value at the time of the decedent's death and the type and amount of any encumbrance. Where the decedent's date of death is on or after March 28, 2013, the lien amount will be deducted from the value of the real property for purposes of calculating the inventory fee under MCL 600.871(2). You are required within 91 days from the date your letters of authority are issued, to submit to the court the information necessary to calculate the probate inventory fee that you must pay to the probate court. You may use the original inventory for this purpose. [MCL 700.3706, MCR 5.307]

ESTATE (OR INHERITANCE) TAX INFORMATION: You may be required to submit to the court proof that no estate (or inheritance) taxes are due or that the estate (or inheritance) taxes have been paid. **Note:** The estate may be subject to inheritance tax.

