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**INFORMAL PROBATE GUIDELINES**

**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**

**FIRST STEP:** Complete and file the originals of the following forms:

- 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 filed, complete PR-1805)
- PR – 1805 Notice to Interested Persons and Time Limit for Filing Claims \*
- PR – 1817 Affidavit of Service – Application, Will & Notice to Interested Persons
- 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 APPOINTMENT of the PR:** complete and file the originals of the following:

**SECOND STEP: INVENTORY**

- PR – 1811 Inventory **DUE** no later than 6 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 Service – inventory to interested persons

**THIRD STEP: ESTATE ACCOUNT**

- PR – 1814 Estate Account w/ attached schedules
- PR – 1817 Affidavit of Service – final account to interested persons
- Note 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 TO BE FILED:

Original Affidavit or Proof of Publication from newspaper  
Copy Funeral Receipt marked paid in full  
Original Closing Certificate for Fiduciary from WI Dept of Revenue

**BOND:** May be required prior to appointment of the PR; determination will be made whether 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 and file the originals with the Register in Probate office when the estate is opened:  
PR-1930 Consent to Serve as Trustee  
PR-1829 Letters of Trust

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

**CLOSING:** **All estates shall be closed 14 months after the Application is filed. If an extension is necessary, the Personal Representative must file a *Petition for Extension of Time* (PR-1833).**

**COSTS:** Certified copies of Domiciliary Letters are available from the Register in Probate for a fee of \$4 each. All other certified copies of documents are \$3 per certification and \$1 per page.

**FORMS:** All of the forms referenced in this *Guideline* can be found on the Wisconsin Court System Website: [www.wicourts.gov](http://www.wicourts.gov) The Register in Probate DOES NOT provide forms to the public.