

Personal Representative's
A (GUIDE
TO
INFORMAL ESTATE ADMINISTRATION
IN WISCONSIN



Developed by the
Wisconsin Register in Probate Association
Revised October 2022

Additional information is available at:
<http://www.wripa.org/>
<https://www.wicourts.gov/services/public/selfhelp/probate.htm>
<http://wilawlibrary.gov/topics/estate/probate.php>

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Definitions

Administration: A court-supervised process to:

- Give notice to creditors and *interested persons*.
- Determine who the heirs and beneficiaries are.
- Collect and inventory assets.
- Determine and pay federal and state taxes.
- Pay claims and administration expenses.
- Transfer assets of a decedent to heirs or to beneficiaries under a *Will* or *Codicil*.
- Account for the disposition of assets that are collected.

Beneficiary: A person named in the *Will* or *Codicil* to receive an interest in property from a decedent; sometimes referred to as legatee.

Bequest and Devise: Used in a *Will* or *Codicil* to grant an interest in property.

Codicil: A written document made by the decedent that changes an existing *Will*. In Wisconsin a *Codicil* and a *Will*, to be validly executed, must be executed with the signature of two witnesses and the signature of the testator or someone under his or her direction.

Deceased: A person who has died.

Decedent: The person who has died whose estate is subject to administration.

Domicile: Is the place where a person has his or her fixed and permanent home or residence to which he or she intends to return after any absence. It is not a special or temporary residence but a home or residence intended to be permanent for an unlimited or indefinite period.

Fair Market Value: A property's full value is defined as its fair market value, or the amount the property will sell for in an arms-length transaction on the open market between a willing seller not obliged to sell the property and a willing buyer not obliged to purchase it.

Heir: Any person, including a surviving spouse, who under state law is entitled under the statutes of intestate succession to an interest in property of the decedent.

Interested Person or Person Interested: Includes one or more of the following:

- Any *heir* of the decedent (even if not named in the *Will* or *Codicil*).
- Any beneficiary named in the *Will* or *Codicil*, and may include a beneficiary of a *trust*, the *trustee* of any existing *trust*, and a nominated *trustee* in the *Will* or *Codicil*.
- Personal Representative named in the *Will*.

Intestate: Not having made a valid *Will*. When a decedent has died “intestate,” the distribution of assets follows the statutes of intestate succession.

Issue: “*Issue*” are children, grandchildren, great-grandchildren, and lineal descendants of more remote degrees, including those who occupy that relation by reason of adoption (under § 854.20, Wis. Stats.) and non-marital children and their lineal descendants (to the extent provided by § 852.05, Wis. Stats.).

Legal Description: A complete description of land recorded in a document filed with the register of deeds, such as occurs in a deed. Typically, this description is by lot number in a platted and recorded subdivision, or by “metes and bounds”. A postal address is not a “*legal description*.”

Per Stirpes: Property is divided into equal shares for the decedent's children, one share for each surviving child and one share for each deceased child; the deceased child's share is divided among the surviving *issue* of the deceased child (i.e. by right of representation).

Personal Representative: Any person authorized to administer a decedent's estate. Evidence of this authorization is found in Domiciliary Letters granted by the court or by the Probate Registrar. A personal representative may be nominated in a *Will* or *Codicil*.

Probate: Technically speaking, *probate* is the proof of the validity of a *Will* in court proceedings and the *probate* of the assets of a *decedent* involves the process of administering the assets as directed under the *Will*. However, *probate* or *probate administration* are terms often associated with administration of the property of persons who have died *intestate* (leaving no *Will*), as well as the

property of minors, persons determined to be incompetent, and persons unwilling or unable to manage their income or assets.

Probate Registrar: An officer of the court designated to perform the functions of the court in informal estate proceedings.

Testate: Having made a valid *Will*. When a decedent has died “testate,” distribution of assets follow the *Will*.

Testamentary Documents: In addition to a *Will* and *Codicil*, any other governing document can be considered a testamentary document such as a marital property agreements.

Testamentary Trust: An arrangement outlined in a *Will* in which one party, appointed by the court as *trustee* (sometimes a bank), holds and distributes property for the benefit of another.

Trustee: A person who holds in trust the title or power over property.


Will: A document, properly executed prior to death, which directs distribution of property after death and nominates who will care for and distribute property. It may nominate someone to care for minor children and/or handle assets in a testamentary trust. In Wisconsin a *Codicil* and a *Will*, to be validly executed, must be executed with the signature of two witnesses and the signature of the testator or someone under his or her direction.

Frequently Asked Questions

What is the Purpose of this Booklet?

This booklet has been developed by the Wisconsin Register in Probate Association. It is NOT meant to provide legal advice; it is merely a guide that may help you through the estate administration process. We suggest that you review the terms under “Definitions” on page 3 before reading on.



Look for this check mark,  it will give you tips on navigating the informal administration estate process.

What Types of Administration are there?

Formal and Informal Administration

Formal Administration is the administration of the decedent’s estate, intestate or testate, with exercise of continuous supervision by the Court. A *Formal Administration* requires the assistance of an attorney.

Informal Administration may be granted without an attorney's assistance. *Informal Administration* is the administration of the decedent’s estate without continuous court supervision, and is supervised by a Probate Registrar.



It may be appropriate for you to consult with an attorney before attempting any of the types of estate administrations.

Summary Settlement

Summary Settlement is a type of estate administration designed to assist in settlement of small estates and does not require an attorney's assistance. *Summary Settlement* is available for estates having a value of \$50,000 or less, if the decedent had a surviving spouse/domestic partner or had surviving minor children.

Summary Settlement is also available if the value of the estate does not exceed certain costs, expenses, allowances and claims, regardless of whether there is a surviving spouse/domestic partner or minor children. The value of the estate is calculated by subtracting from the gross amount of assets any debts for which property of the estate is security.

Summary Assignment

Summary Assignment is a type of estate administration for estates of \$50,000 or less and was designed to assist in settlement of small estates that cannot be settled by a *Summary Settlement*.

Transfers of Property without Estate Administration

There is a method to transfer a decedent's assets without a court supervised administration, called "*Transfer by Affidavit*," for estates having a value of \$50,000 or less. The State Bar of Wisconsin maintains and updates this form and you can find the guide for the forms at [PR-1831](#). The person who completes and uses this form has certain legal responsibilities and it may be appropriate to consult with an attorney before deciding whether you should use a "*Transfer by Affidavit*".

What is Informal Probate?

Informal probate is the administration of the decedent's estate, testate or intestate, without continuous supervision of the court. Informal Administration is started by filing an application with the Probate Registrar in the county where the decedent domiciled (i.e. resided) and/or where the decedent's assets are located if the person did not domicile in Wisconsin. The Probate Registrar will determine whether a Will is entitled to be probated and whether the application for Informal Administration should be granted or denied.

Common reasons for denial of an application for Informal Administration can include;

- The original Last Will and Testament of decedent cannot be found.
- Improper execution/attestation and or validity of decedent's Last Will and Testament.
- Unclear or impossible provisions in the decedent's Last Will and Testament.
- The decedent's Will prohibits Informal Administration.
- If decedent died without a Will and all heirs do not consent in writing to Informal Administration or the nominated personal representative.
- If an interested person/heir/beneficiary demands Formal Administration.

The denial of an application does not prevent the filing of a petition for Formal Administration by a person interested in the estate.

How Can I tell if Informal Probate is the Way to Go?

The choice of estate administration is a legal decision and court staff cannot provide this advice to you. Decisions about which estate administration procedure would be most appropriate are often

affected by the presence or absence of interested persons who do not agree on what should be done, tax issues, the size of the estate, claims, and the need to have a judge determine or decide issues such as disputed claims, the validity of a will, the meaning of the terms of a will, or who are the heirs.

You should determine if the decedent died testate (with a Last Will and Testament) or intestate (without a Will). You must make a diligent search for a Will and/or Codicil of the decedent. If, after a diligent search, you do not find a Will, it may be that the decedent has left no Will and any estate administration must be done intestate (without a Will).

If the decedent has not advised you where his or her original Will can be located, some places to search might include a safe deposit box in the decedent's bank; the safe, or firebox at the decedent's home, or wherever the decedent kept his or her other important papers. Sometimes the original Will may be found in the Office of Register in Probate where a decedent deposited it for "safekeeping" before his or her death. Not all counties, however, allow such deposits for "safekeeping." Sometimes, the original Will may be in the possession of the attorney who drafted it. There may also be an original Codicil or Codicils that modify the Will.

Make a list of the heirs under the statutes, see [Intestate Succession Chart](#). Then, if there is a Will (including any Codicils), make a list of the beneficiaries (those named in the Will and Codicils).

Make a list of all assets in which the decedent had an interest. Include real estate and all personal property (i.e. cash, CD's, stocks, bonds, vehicles, machinery, promissory notes, etc.). The list should include the estimated value of each asset and how each asset is owned (i.e. solely, jointly, marital, payable at death, etc.). If you are not able to obtain all this information because the assets are solely owned, just make the best list you can for now; the exact details can be resolved later.

You are now ready to determine the type of estate administration procedure required to settle the final affairs of the decedent. Choosing the right procedure is very important. You are encouraged to discuss the decedent's Will, the working relationship among the heirs and/or beneficiaries and the decedent's asset situation, as determined above, with an attorney.

If it appears that informal estate administration is the preferred procedure, read on.

Where can an Application for Informal Estate Administration be Filed?

An application for informal estate administration is to be filed in the county where the decedent was “domiciled” (i.e. resides) at the time of his or her death. However, if the decedent had no domicile in Wisconsin, an application for informal estate administration may be filed in any county in Wisconsin where property of the decedent is located.

Do I need an Attorney for Informal Estate Administration?

Wisconsin statutes do not require you to hire an attorney to assist with an informal estate administration, however you may seek the advice or services of an attorney at any point during the process. During the estate administration process, a demand for formal proceedings may be filed with the court, at which time, the services of an attorney may be necessary.

It is important for you to remember that most Probate Registrars are not attorneys. Even if your local Registrar is an attorney, statutes prohibit Registrars from giving legal advice. A Registrar's role is to advise a personal representative, within the Registrar's competence, in the preparation of any of the documents required to be filed with the court in an informal estate administration. Think of this as giving advice as to how the various forms should be completed, not giving advice as to how you should proceed in any area. This guide is an attempt to assist the Registrar in giving a personal representative the required document preparation direction.

How Do I Start an Informal Estate Administration?

All forms are available on-line and can be found at: www.wicourts.gov.

You may file your documents by using one of these three methods:

- Fill the forms in on-line as a Word document and then print; or
- Print the forms and complete by hand in ink; or
- You may also take advantage of the Wisconsin Court System's electronic filing options and eFile your probate paperwork at <https://www.wicourts.gov/ecourts/efilecircuit/index.jsp>.
- Follow the instructions to register for an e account.
- Create an eFiling account, pay the appropriate fee and electronically file your paperwork.

The following forms are required to initiate an informal proceeding:

The following startup forms are always required:

- Application for Informal Administration ([PR-1801](#))
- Proof of Heirship ([PR-1806](#))
- Consent to Serve ([PR-1807](#))
(Signed by nominated personal representative and may include Appointment/Acceptance of Resident Agent.)
- Statement of Informal Administration ([PR-1808](#))
- Domiciliary Letters ([PR-1810](#))

If you have obtained the signatures of all interested persons on the Waiver and Consent form, the following forms are also required:

- Waiver and Consent (Informal Administration) ([PR-1803](#))
- Notice to Creditors ([PR-1804](#))

If you have not obtained the signature of all the interested persons on the Waiver and Consent form, you will be required to complete this form instead:

- Notice Setting Time to Hear Application and Deadline for Filing Claims (Informal Administration) ([PR-1805](#))



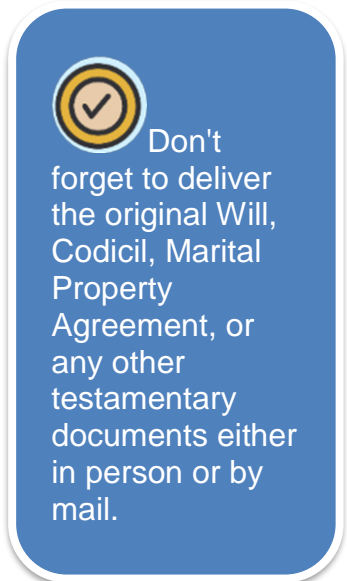
Use black ink, keep your originals and file legible copies.



The original Will, Codicils and any other testamentary documents must be delivered to the court.

The Probate Registrar may require the following documents, depending on local practice and who the heirs/beneficiaries are:

- Signature Bond in Estate or Trust Proceedings ([PR-1809A](#))
- Surety Bond (obtained from an insurance agent) and the Court Approval of Signature Bond in Estate or Trust Proceedings ([PR-1809B](#))
- Affidavit of Service (Probate) ([PR-1817](#))
- Consent to Serve as Trustee ([PR-1930](#)) (signed by nominated trustee – may include Appointment/Acceptance of Resident Agent)
- Letters of Trust (Informal and Formal Administration) ([PR-1931](#))
- Declination to Serve or Resignation (Informal and Formal Administration) ([PR-1802](#))
- Order Appointing Guardian Ad Litem or Attorney ([GF-131A](#))
- Consent to Act ([GF-131B](#))
- Petition to Dispense with Guardian ad Litem (Informal and Formal Administration) ([PR-1820](#))
- Order Dispensing with Guardian ad Litem (Informal and Formal Administration) ([PR-1821](#))



You are now ready to apply for informal estate administration. It is always advisable (and in some counties required) that you set an appointment to see the Probate Registrar or a designated staff member when you are ready to file the above documents.

How Do I Complete the Informal Estate Administration?

The following documents are required to be filed in an informal estate administration:

- Affidavit or Proof of Publication (Provided by the newspaper once publication has been paid.)
- Inventory (Informal and Formal Administration) ([PR-1811](#)) (A statutory filing fee must accompany this form.)
- Affidavit of Service (Probate) ([PR-1817](#)) (of Inventory to Heirs/Beneficiaries)
- Estate Receipt (Informal and Formal Administration) ([PR-1815](#))(Signed by heirs/beneficiaries and claimants.)
- Statement of Personal Representative to Close Estate (Informal Administration)([PR-1816](#))

The Probate Registrar may require the following documents depending on local practice and/or the particulars of the estate you are administering:

- Estate Account (Informal and Formal Administration) ([PR-1814](#))
- Affidavit of Service (Probate) ([PR-1817](#)) (of final Estate Account to Heirs/Beneficiaries)
- Notice of Distribution to Ward (Informal and Formal Administration) ([PR-1822](#)) (To notify the court appointing a guardian of the estate of the total property to be distributed to the guardian of the estate for the benefit of the guardian's ward at least ten days prior to the distribution.)
- Closing Certificate for Fiduciaries (Obtained by filing a [Schedule CC](#) form with the Wisconsin Department of Revenue)
- Receipt for Perpetual Care or Funeral Receipt
- Proof of Recording of Documents Transferring Real Estate
- Statement of Transfer of Interest in Property (Informal Administration) ([PR-1828](#))
- Statement of Termination and Confirmation of Interest(s) in Property (Informal Administration) ([PR-1827](#))

Can You Give Me Some Practical Suggestions?

Notice to Creditors/Interested Persons

- It is your responsibility to take the Notice to Creditors or Notice Setting Time to Hear Application and Deadline for Filing Claims (Informal Administration) to the newspaper for publication.
- It is also your responsibility to mail a copy of the Notice(s) to all known creditors of the decedent.
- When you pay the bill for the publication, the newspaper will provide you with an Affidavit or Proof of Publication. File the original Affidavit or Proof of Publication with the Court.
- It is your responsibility to mail a copy of the Notice Setting Time to Hear Application, Application for Informal Administration and a copy of the Will and Codicil to all interested persons.
- An Affidavit of Service (PR-1817) provides evidence for the file that documents were sent to the persons and/or businesses whose names and addresses are shown.
- If a hearing on notice is required, the Personal Representative will be appointed after the hearing once the following documents are filed:
 - Affidavit of Publication from newspaper;
 - Form PR-1817 Affidavit of Service showing proof Notice was mailed to all interested persons.
 - Bond, if required. Determination will be made by the Probate Registrar whether bond will be a signature bond (Form [PR-1809A](#)) or a surety bond.

Claims filed by Creditors

- If a claim is paid/satisfied by you, the creditor must provide an Estate Receipt (PR-1815) acknowledging complete satisfaction or settlement of the claim.
- If you dispute the claim, you will be required to demand “formal administration” to have a judge decide the dispute.
- You must be represented by an attorney in proceedings before a judge. For this reason it is wise to seek the assistance of an attorney as soon as you determine that a claim should be disallowed.
- If a claim has been served on you or mailed to you, your objection, offset or counterclaim must be served upon or mailed to the claimant and filed with the court within 60 days of when the claim was mailed to or served upon you as personal representative.

Inventory

- As you gather the decedent's assets in preparation for filing the Inventory form, think of the Inventory as a snapshot of the fair market value of all assets owned by the decedent on the date of death.
- The Inventory is an important legal document that establishes the fair market value of assets on date of death and incorrect valuations can have a significant impact on the personal representative and distributees of the assets listed in the Inventory.
- Income tax basis problems and disputes about proportionate distribution of assets are examples of issues that may arise from improper valuation.
 - Although you are not required to hire a qualified and disinterested appraiser to assist you in determining the value of assets, you should consider whether you have sufficient skills to appraise inventoried assets on your own.
 - You may also wish to consult with a tax advisor or attorney before filing your Inventory.
 - Provide a copy of the Inventory to all interested persons and file an Affidavit of Service

Final Account

- You should prepare a final Estate Account and furnish copies to all heirs/beneficiaries.
- Think of the final Estate Account as a record of what came in to the estate and what went out of the estate between the date of death and the completion of the estate.
- This form should be completed only after you have paid all the decedent's outstanding bills, including the funeral bill, costs of administration of the estate, any proper claims and all applicable taxes.
- Any additional property listed in Schedule A of the Estate Account is subject to an additional .2% filing fee.

Deadlines

- The Inventory must be filed or exhibited no later than the date set in the Notice of Estate Administration Deadlines
- An estate can be closed any time after the final date to file claims has passed and should be closed within 12 months of the date the estate was opened.
- The deadlines are set in the Notice of Estate Administration Deadlines which is issued to the Personal Representative upon appointment.
- An extension of time may be granted by the Probate Registrar. You must complete the Petition for Extension of Time ([PR-1833](#)) and Order for Extension of Time ([PR-1834](#)) and file these forms with the Probate Registrar to consider.
- Failure to meet any deadline established by the Probate Registrar will result in the personal representative being required to appear in court to show cause as to why the personal representative should not be removed or other sanctions imposed.
- Termination of appointment as personal representative
- The Statement of Personal Representative to Close Estate is normally the final document filed in an estate, but it does not mean that you are done. If, six months after filing the statement, no other proceedings are pending in the court, your appointment as personal representative terminates.

Wisconsin Statutes

- You may need to review the statutes during this process.



If you will be selling or transferring an interest in real estate, you will be required to sign a deed or transfer document with the proper legal description (not a postal address). You may wish to have an attorney prepare this important legal document, as mistakes in the legal description can affect ownership interest in the property.

- Check your law library at your local courthouse, public library, the Wisconsin State Law Library (<http://wilawlibrary.gov/>) or the Wisconsin State Legislature (<http://docs.legis.wisconsin.gov/statutes>).

Within the scope that has been discussed earlier in this booklet, your local Probate Registrar is here to see you through the informal estate administration process. We hope this booklet is helpful and we welcome your comments on ways that we may improve it to better assist others in the future.

What Should I Know About Being a Personal Representative?

A statement in a Will about who should serve as personal representative does not automatically allow you to start performing the duties of a personal representative; the statement in the Will is simply a nomination by the decedent. The Probate Registrar or Judge must appoint you before you assume the duties of a personal representative. The document that shows others you are appointed as Personal Representative is called "Domiciliary Letters." For a nominal statutory fee, the Probate Registrar will supply you as many certified copies of this document as you feel you will need at any time throughout the estate administration process.

Serving as personal representative is a very important job. You may be required to post a bond to protect the assets in the estate. You must keep all interested persons informed of the status of the estate proceedings and complete the estate in a timely fashion. The Probate Registrar will send you a Notice of Estate Administration Deadlines showing the Inventory due date and the date by which the estate is to be closed.

For all practical purposes, a personal representative is acting in place of the decedent. You are expected to handle the assets of the decedent just as any prudent person would handle his or her own assets.

Your duties will include taking possession (marshaling) of all the decedent's assets and filing an Inventory with the date of death values of all assets you have in your control. You may need to open a checking account to assist you with keeping accurate records of income and expenses. The Probate Registrar cannot require that you use a checking account, nor is it always needed.

You will give notice to creditors and may give notice to interested persons by publication in the newspaper. Your Registrar can identify which papers are eligible for publication. Notice must also be given to interested persons by mail or personal service if Waiver and Consent forms cannot be obtained.

You may be converting assets to cash, selling real estate, running a business, insuring and keeping property in good repair.

You will collect any income due to the decedent like interest, dividends, rent, etc. You will pay bills, settle proper claims or object to claims that are not appropriate.

You must file a Closing Certificate for Fiduciaries. This document is obtained by preparing and filing a Schedule CC, Request for a Closing Certificate for Fiduciaries, with the Wisconsin Department of Revenue. See link for the Wisconsin Department of Revenue [at the end of this booklet](#). There may be additional final and fiduciary tax returns to complete. You are encouraged to utilize the services of a competent tax preparer or an attorney to help you with this aspect of the estate.

You must prepare a final Estate Account, showing all money and assets that came into the estate between date of death and distribution, and all money and assets that were paid out of the estate. You may be required to file the Estate Account with the Probate Registrar. To prepare an Estate Account, you must keep accurate records. There are many ways to keep records. An inexpensive method is to prepare a ring binder or spiral notebook for “scheduling” your financial activities, such as receiving



Applying for an Employer Identification Number (EIN) is a free service offered by the Internal Revenue Service. Beware of websites on the Internet that charge for this free service.

assets, paying bills or making distributions. A sample “scheduling” page can be found on [at the end of this booklet](#). If you make entries in your notebook or ring binders as these activities occur, there is less chance that you will make mistakes in your accounting and it will take less time to complete your Estate Account. It will also be easier for someone to help you complete your accounting if you have kept accurate records.

You will distribute assets according to the Will and/or statutes and secure receipts from those receiving assets.

Finally, you will file a Statement of Personal Representative to Close Estate. If no proceedings challenging your Statement or otherwise involving you as personal representative are pending in the court six months after your Statement is filed, your appointment as personal representative terminates.

As personal representative, you may obtain a discharge from personal liability for federal tax deficiencies by preparing and filing Form 5495 with the Internal Revenue Service. A link to obtain Form 5495 is included in this Guide at the [end of this book](#). Please note that the discharge from personal liability applies only for tax returns that have been filed and are listed in your Form 5495 or filed with it.

How do I Complete the Required Forms?

On the following pages you will find samples of the "usual" informal administration forms you will need to complete. A brief explanation appears just prior to each “Sample” form.



As personal representative, you are responsible for paying any taxes that are owed by the estate or the decedent, from the estate assets. These include the decedent’s gift and income taxes, as well as the income and estate taxes owed by the estate. You may incur personal liability for these taxes if they are owed and not paid from available estate assets. You should consult with an attorney or tax advisor about these issues if you have questions about potential tax liabilities of the decedent or the estate. You should investigate whether all potential taxes owed by the decedent were paid. A starting point would be for you or your advisor to review prior tax returns of the decedent, as well as any actions of the decedent that could give rise to income or gift tax liability.

Wisconsin requires that you use the mandatory probate forms you see in this booklet. Forms may be available for purchase from your Probate Registrar or obtain them online for free. You may also access the most up-to-date forms on the Internet at the State of Wisconsin Supreme Court [website](#). The forms are available in Word or PDF format to complete online or on your electronic device.

You may also take advantage of the Wisconsin Court System's electronic filing options and eFile your probate paperwork at

<https://www.wicourts.gov/ecourts/efilecircuit/index.jsp>.

- Follow the instructions to register for an e account.
- Create an eFiling account, pay the appropriate fee and electronically file your paperwork.

Remember, the Probate Registrar cannot fill out the forms for you unless you have a qualified disability under the American with Disability Act. The Probate Registrar is, however, required by statute to check the data you provide and, if necessary, request further information from you or to file an amended document.

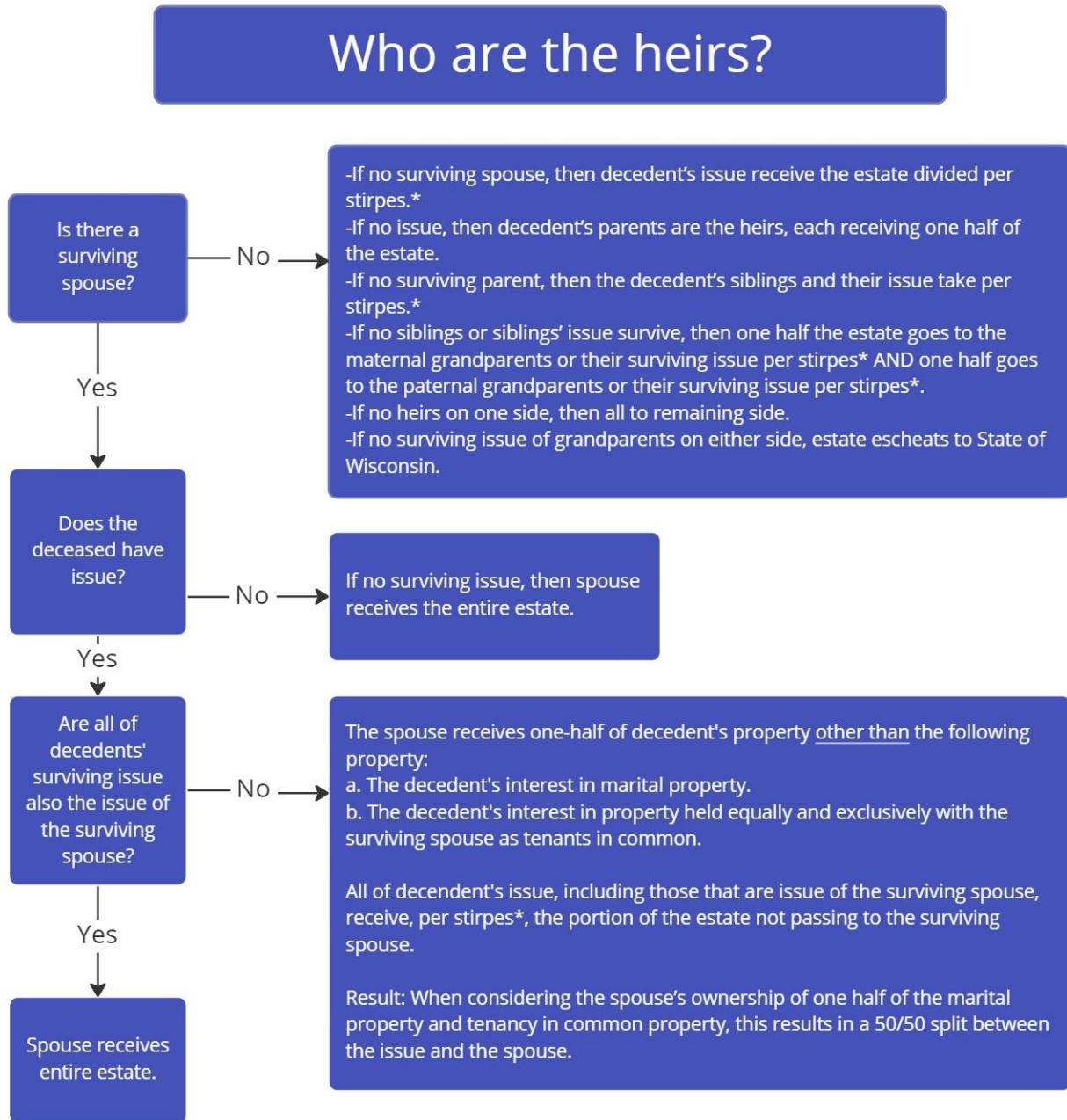


The original Will, Codicils and any other testamentary documents must be delivered to the court.

Intestate Succession Chart

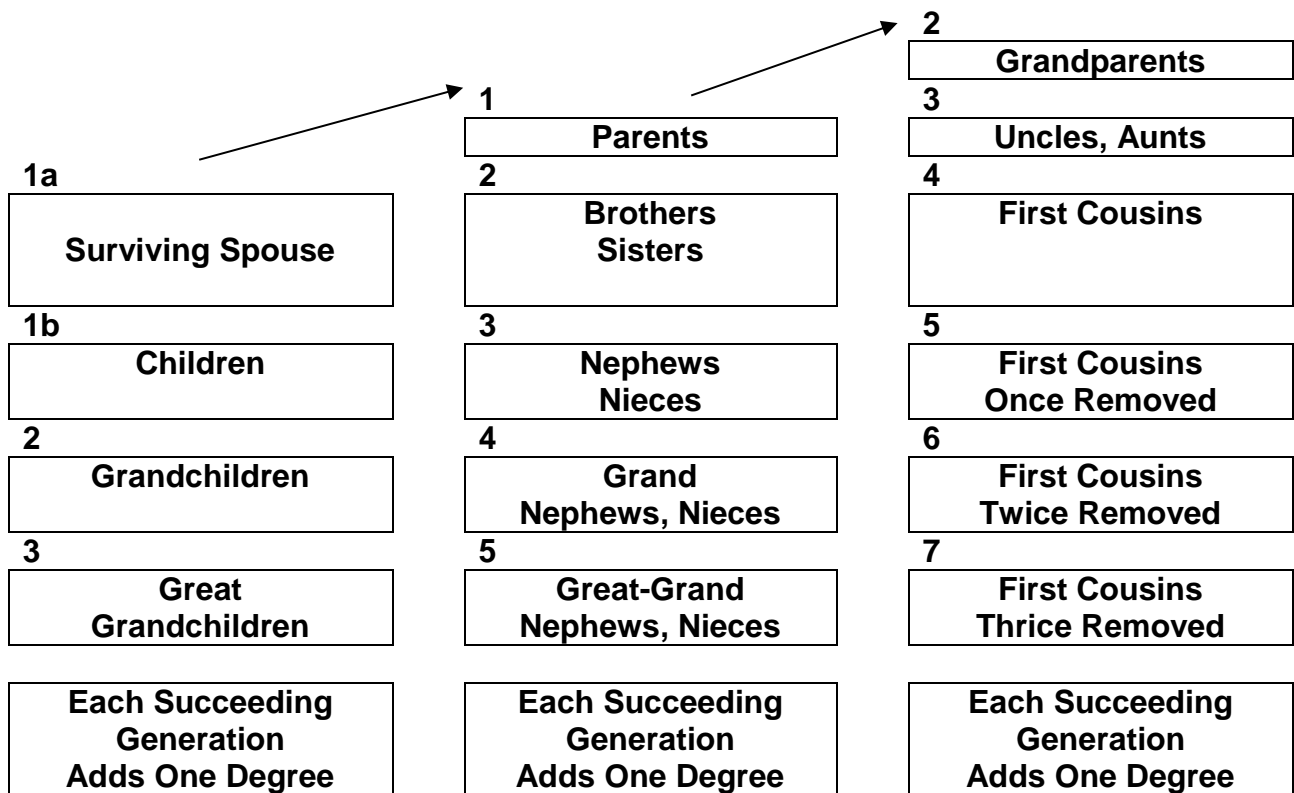
If there is no will, the decedent's heirs receive the property. Wisconsin Law defines who the heir is when there is no will. To determine the heirs use this flow chart.

For this chart, if there is a surviving domestic partner, that person takes the place of the surviving spouse



Per Stirpes: Property is divided at each generation, one share for each surviving person and one share for each deceased person; any deceased person's share is divided among that person's issue in the same way. (Also referred to as by right of representation). So if 3 children, the portion going to decedent's children is divided into thirds. Then if one of the children is also deceased and had 2 children, that share is divided equally between the two grandchildren. If one of those grandchildren is deceased then between their issue, but if none, that share goes to the others surviving in that generation.

See Wis. Stats. §§ 990.001(16), 852.01 for basic rules of intestate succession.

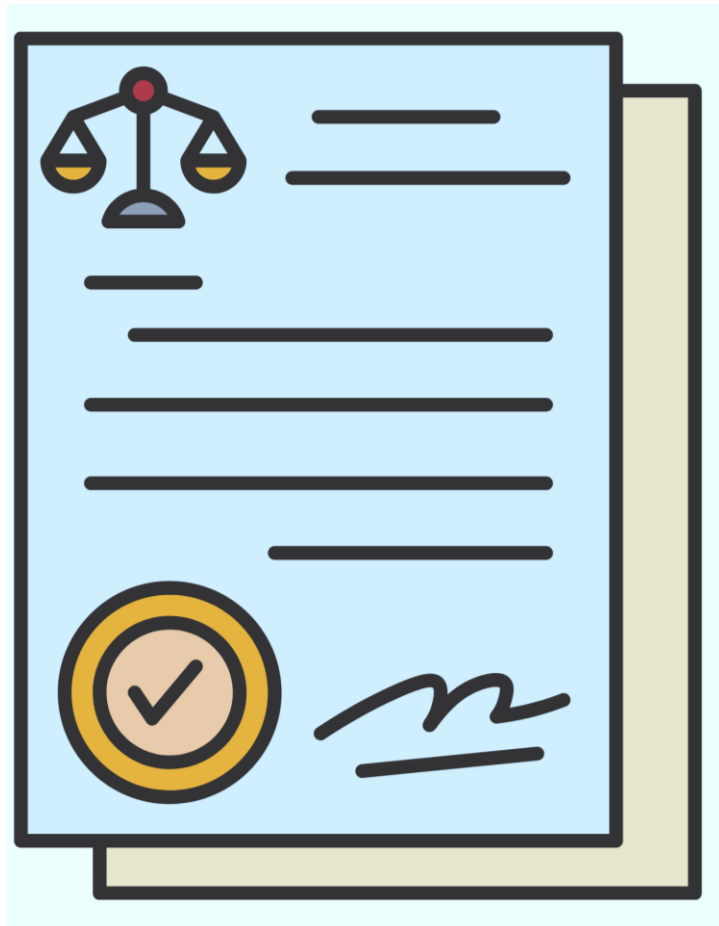


Forms

Please type or print in black ink legibly when filling out your forms, as it will make it easier for you to make copies for filing and notice to interested persons. Please retain the originals in a safe place, as you may be required to produce them at a later date.

The Probate Registrar cannot fill out the forms for you unless you have a qualified disability under the American with Disability Act. The Probate Registrar is, however, required by statute to review the information you provide and, if necessary, request further information from you or to file an amended document.

Any form that requires notarization of your signature must be notarized. Remember to wait to sign the document; a notary must see you actually sign the form. You may be required to produce identification. If you are not going to come to your local Office of Register in Probate to sign the form, you can usually find a notary public at your bank. If you live in another state, you may use a local notary.



Important Information about these Sample Forms

The following sample forms are completed as if the decedent had a valid Will. The decedent is single.

This hypothetical Will provides for specific bequests to individuals and an equal sharing (25% each) of remaining (residual) estate. The specific bequests are as follows:

- Mary Smith, individually: the antique duck decoy collection, all personal property
- Susan Brown, individually: Fishing Equipment and tackle and Tundra long range hunting rifle.
- Mary Smith, as trustee of the Trust for the Benefit of John Miller: 250 shares of AT&T stock.

The hypothetical Will provides for any dividends paid before distribution of the specific bequests to be considered income earned by the estate (not the beneficiary) and that distributions of property shall be at the values listed in the personal representative's Inventory and not current values at time of distributions.

If you are administering an estate with a Will, distributions must follow the directions of the Will. It is recommended that you obtain appropriate tax or legal advice if you will be attempting to distribute proportionate shares of non-cash assets and if family members want to make alternative arrangements.

There are special considerations for married persons due to marital property rules in Wisconsin. We have provided an example of an inventory to show marital property designations.

Checklist for Opening an Informal Estate Administration	
<input type="checkbox"/>	Application for Informal Administration (PR-1801)
<input type="checkbox"/>	Proof of Heirship (PR-1806)
<input type="checkbox"/>	Original Will (and Codicils, if any)
<input type="checkbox"/>	Waiver and Consent (Informal Administration) (PR-1803)
<input type="checkbox"/>	Consent to Serve (PR-1807)
<input type="checkbox"/>	Statement of Informal Administration (PR-1808)
<input type="checkbox"/>	Signature Bond in Estate or Trust Proceedings (PR-1809A) OR
<input type="checkbox"/>	Surety Bond (if required)
<input type="checkbox"/>	Domiciliary Letters (PR-1810)
<input type="checkbox"/>	Notice to Creditors (PR-1804) OR
<input type="checkbox"/>	Notice Setting Time to Hear Application and Deadline for Filing Claims (PR-1805)
<input type="checkbox"/>	Notice Concerning Fiduciary Relationship (IRS Form 56)
<input type="checkbox"/>	Declination to Serve or Resignation (if necessary) (PR-1802)
<input type="checkbox"/>	Order Appointing Guardian ad Litem or Attorney (if required) (GF-131A)
<input type="checkbox"/>	Consent to Serve as Trustee (if necessary) (PR-1930)
<input type="checkbox"/>	Letters of Trust (if necessary) (PR-1931)



Do not include confidential information on the document(s) such as;

- Social security numbers,
- Employer or tax ID numbers,
- Driver license numbers,
- Financial accounts numbers, and passport numbers.

If you must include this type of information use the Confidential Disclosure of Protected Information form [GF-241](#).

Application for Informal Administration

Form No.: [PR-1801](#)

Purpose of Form: To apply to the Court for informal administration of an estate.

Directions:

PAGE 1.

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number.

Question #1

Insert the decedents:

- a) Date of birth
- b) Date of death
- c) County and state in which he/she was domiciled
- d) Post office address

Question #2

You must indicate in what way you are an "interested person" in the estate. Are you an heir, a beneficiary under a Will or Codicil, nominated as a Personal Representative in the Will or Codicil, or a nominated Trustee or trust beneficiary, etc.?

Question #3

Check the appropriate box to indicate whether there is another estate open for this decedent. If you check ARE, enter in the explain area which county and state the other probate is being administered.

Question #4

You must insert an “estimate” of the total gross value of decedent’s assets that are subject to this estate proceeding. This amount is not binding on you or anyone else; it is just an estimate.

Question #5

Check the appropriate boxes concerning assistance programs from which the decedent may have received aid. If you are uncertain, check the box to indicate you lack information concerning aid.

Question #6

This question must be answered. Indicate the name of the spouse, whether deceased or previously divorced, and check the appropriate boxes concerning benefits. If you are uncertain, check the box to indicate you lack information concerning aid. If there was more than one spouse, check the box and attach a separate page with the name and other appropriate information.

Question #7

If the decedent had a Will or Codicil, include that information at this time. Also indicate the name of the person nominated in the decedent’s Will as the Personal Representative or Executor. If more than one person has been nominated as “Co-Personal Representative,” include the name for each party.

If any person nominated as Personal Representative is now deceased, include his or her name and date of death. Also indicate the name of the alternate personal representative.

If the Will establishes a Testamentary Trust to be administered by a Trustee, insert the name of the person nominated as Trustee.

PAGE 2.

Question #8

If you have made a diligent inquiry and are convinced that the decedent left no Will, then check this box.

Question #9

Insert the name, relationship (what makes the person “interested”), and address of each “interested person”.

Refer to the “definitions” section regarding who is an “interested person.” Make sure that you list the names of all the “interested persons.” If there are minors, include their dates of birth. If an interested person has been found by a court to be incompetent, include the name and address of his or her guardian.

If there is an existing trust (not the Testamentary Trust established in the Will) that is named as a beneficiary under the Will, insert the name of the trustee for that trust and the trustee’s address.

If the Will provides for a Testamentary Trust and Trustee, you must also include the name and address of the Trustee as an interested person and prepare a Consent to Serve (by Trustee) and Letters of Trust that must be issued at the same time as the Domiciliary Letters.

Question #10

Any special fact requiring court action, you may insert here.

Below the words: “I request:” check all boxes that apply and indicate what you are asking the Probate Registrar to do.

On the lines provided, type the name, address, email address and telephone number of the person who is applying to open this proceeding. If the applicant is a lawyer, include the state bar number.

Complete the “Form Completed by” box in the lower left corner of the form. This needs to be done on all forms submitted to the court.

The applicant must sign this form in front of a Notary Public. The Probate Registrar may instruct you to wait and sign the form at the time you bring it back to the office to open the estate. In that case, the Registrar will notarize your signature.

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOTT

Name

Application for Informal Administration

AKA Bill Elliott

Case No. _____

UNDER OATH, I STATE:

- The decedent, with date of birth December 30, 1940 and date of death April 10, 2022, was domiciled in Decedents' County County, State of Wisconsin, with a mailing address of 123 Something Street, Someplace, WI 51111.
- I am interested as an heir (nominated personal representative/trustee) (beneficiary) _____.
- Other proceedings concerning the estate of the decedent are are not pending in this state or elsewhere. Explain: _____.
- The estimated net value of decedent's property requiring administration is \$250,000.
- The decedent
 - did did not receive Medical Assistance/Medicaid.
 - did did not receive Family Care and/or Partnership benefits (through a Managed Care Organization – MCO/CMO).
 - did did not receive benefits from the Community Options Program (COP).
 - did did not receive benefits from Wisconsin Chronic Disease Program.
 - was was not a patient or inmate of a state or county hospital or institution, or responsible for any person owing an obligation to the state or county.
 Explain: _____
 I lack information to complete this section.
- If the decedent was ever married, complete the following: (If more than one spouse **See attached**.)
 Name of spouse (living or deceased) Sally Elliot
 Married to decedent Divorced from decedent at time of decedent's death.
 The spouse did did not receive benefits from the Community Options Program (COP).
 The spouse did did not receive benefits from the Wisconsin Chronic Disease Program.
 I lack information to complete this section.

(Complete question 7 OR 8 below, whichever is applicable.)

7. The decedent died leaving a will, dated October 1, 2020.
 codicil(s) (if any), dated _____.

I believe these documents were executed properly and are valid. I made diligent inquiry and am unaware of any revocation by decedent.

- The original will, including any codicil(s),
 is in the possession of the court.
 accompanies this application.
 was probated elsewhere and an authenticated copy accompanies this application.
 is en route to the court by mail or personal delivery (for eFilers only).

The personal representative(s) named by the decedent in the will and/or any codicil is:
Name(s) Albert Elliott, who has declined to act, Mary Smith, alternate

I nominate Mary Smith to serve as personal representative(s).

The trustee(s) named by the decedent in the will and/or codicil is:
Name(s) Mary Smith

I nominate Mary Smith to serve as trustee(s).

8. I made diligent inquiry and am unaware of any unrevoked will of the decedent and believe that the decedent died leaving no will.

I nominate _____ to serve as personal representative(s).

9. The names and mailing addresses of all interested persons are:
(For any person with disabilities, also list any guardian of estate; for any person in the military, also list attorney or attorney in fact; and for any minor, list date of birth.) See attached

Name	Relationship <small>[e.g. Heir, Beneficiary, Fiduciary]</small>	Mailing Address <small>[Street, City, State, Zip]</small>	If Minor, Date of Birth
Mary Smith	Heir, Beneficiary, Nominated Personal Representative & Trustee	555 Blank Street, Someplace, WI 51111	
John Miller	Heir, Beneficiary, Trust Beneficiary	100 First Street, Someplace, WI 51111	June 1, 2019
Susan Brown	Heir, Beneficiary	100 Second Street, Someplace, WI 51111	
Jane Jones	Heir, Beneficiary	100 Third Street, Someplace, WI 51111	
Jacob Jones	Guardian of Estate of Jane Jones	100 Third Street, Someplace, WI 51111	

10. Other: _____

I REQUEST:

1. A statement of informal administration be issued.

2. The will, including any codicil(s), be admitted to informal administration.

3. Domiciliary letters be issued to Mary Smith

4. Letters of trust be issued to Mary Smith
for the following trust: Trust under the Will of William Elliott for the Benefit of John Miller

Letters of trust be issued to _____
for the following trust: _____

5. Other: _____

State of _____
County of _____
Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed

My commission/term expires: _____

This notarial act involved the use of communication technology.

▶ _____
Applicant

Mary Smith
Name Printed or Typed

555 Blank St., Someplace, WI 51111
Address

M.Smith.Address@email.com (715) 999-9999
Email Address Telephone Number

May 24, 2022

Date State Bar No. (if any)

Form completed by: (Name) Mary Smith	
Address 555 Blank Street, Someplace, WI 51111	
Email Address M.Smith.Address.email.com	
Telephone Number	State Bar Number (if any)

Proof of Heirship (Informal and Formal Administration)

Form No.: [PR-1806](#)

Purpose of Form: To document, under oath, the person(s) who are the heirs of the decedent.
To be completed by an individual with knowledge of the decedent's heirs.

Directions:

PAGE 1.

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number.

Question #1

Fill in your name, address and relationship to the decedent.

Question #2

Check the appropriate box.

If the decedent was survived by a spouse or domestic partner, fill in the name of that person.

Question #3

Under 3A, check the appropriate box. If the decedent had children, list the names of all children. If any child is deceased, indicate the date of death.

Under 3B, for each deceased child, list the name(s) of his or her children. If any of those children are deceased, indicate the date of death.

Question #4

Indicate whether all of the decedent's children are also the children of any surviving spouse or domestic partner. If the answer to this question is "no," then provide details.

Instructions: If there are living persons named in questions 2 through 4 on page 1, then go to question number 8.

If there are no living persons named in questions 2 through 4, then go to question number 5.

Question #5

Check the appropriate box; if the answer was "yes," then fill in the name of the parent(s).

PAGE 2.

Question #6

Under 6A, check the appropriate box; if the answer was "yes," fill in the name(s) of the living and deceased brothers or sisters and indicate the date of death if deceased.

Under 6B, list the name of each deceased brother or sister as noted in 6a and also list the names of his or her children. If any of those children are deceased, indicate the date of death and the names of his or her children.

Question #7

Read the information on the form and fill in any names if applicable.

Question #8

Must be answered.

The person signing must sign and date the form in front of a Notary Public.

Fill in the "Form completed by" box.

The original of this form is filed with the Office of Register in Probate along with the Application for Informal Administration ([PR-1801](#)). This form must be sent to or served upon all interested persons by you, the petitioner.

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOTT

Name

Proof of Heirship

AKA Bill Elliott

Informal Administration

Formal Administration

Case No. _____

UNDER OATH, I ANSWER THE FOLLOWING QUESTIONS:

1. What is your name, mailing address and relationship to the decedent?

Name	Mailing Address	Relationship
Mary Smith	555 Blank Street, Someplace, WI 51111	Daughter

2. Was the decedent survived by a spouse or domestic partner?

Yes No

If YES, give name: _____

3. A. Did the decedent have any children? (Living or deceased; natural or adopted.)

Yes No

If YES, list all names. (If deceased, indicate date of death.)

See attached

Name of Decedent's Children	If Deceased, Date of Death
Mary Smith Joan Miller Susan Brown Jane Jones	December 1, 2016

B. For each deceased child listed in 3A., list his or her name and the names of his or her children (Living or deceased; natural or adopted). If any of his or her children are deceased, indicate the date of death of that child and the names of his or her descendants. (Living or deceased; natural or adopted.)

See attached

Name of Deceased Child in (3A)	Name of Deceased Child's Child(ren)	Date of Death
Joan Miller	John Miller	

4. If there is a surviving spouse or domestic partner, are all of the decedent's children listed in 3A., also the children of the surviving spouse or domestic partner?

Yes No

If NO, give details: _____

Instructions:

Are there living persons listed in answers to questions 2. through 4.?

- If Yes, skip to question 8.
- If No, continue with question 5.

5. Did the decedent leave surviving parents?

Yes No

If YES, list names.

Name(s)

6. A. If no surviving parent, did the decedent have brothers or sisters? (Living or deceased; whole blood, half blood, adopted)

If YES, list all names. (If deceased, indicate date of death.)

No Yes

Name of Decedent's Brothers or Sisters	If Deceased, Date of Death

- B. For each deceased brother or sister listed in 6A., list his or her name and the names of his or her children (Living or deceased; natural or adopted). If any of his or her children is deceased, indicate the date of death of that child and the names of his or her descendants. (Living or deceased; natural or adopted) See attached

Name of Deceased Brother or Sister in (6A)	Date of Death	Name of Deceased Brother's or Sister's Children

7. If there are **no living persons** listed in questions 2. through 6B., list names of maternal (mother) and paternal (father) grandparents and the descendants of any deceased grandparent and whether the person is living or deceased. Please continue listing children of deceased persons until a living person is named. See attached

MATERNAL (Mother)	PATERNAL (Father)
Grandfather:	Grandfather:
Grandmother:	Grandmother:
Descendants:	Descendants:

8. Did any of the persons named in #2 through #7 die within 120 hours (5 days) after the death of the decedent? No Yes

If YES, list name(s), date of death and descendant(s).

Name	Date of Death	Descendant(s)

State of _____

County of _____

Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed

My commission/term expires: _____

This notarial act involved the use of communication technology.



Signature

Mary Smith
Name Printed or Typed

555 Blank St., Someplace, WI 51111
Address

M.Smith.Address@email.com (715) 999-9999
Email Address Telephone Number

May 24, 2022
Date State Bar No. (if any)

Form completed by: (Name) Mary Smith	
Address 555 Blank Street, Someplace, WI 51111	
Email Address M.Smith.Address@email.com	
Telephone Number (715) 999-9999	Bar Number (If any) N/A

Waiver and Consent (Informal Administration)

Form No.: [PR-1803](#)

Purpose of Form: To obtain consent of interested persons to use informal administration and appoint the proposed personal representative. Also waives notice requirements for a hearing to open the estate. A waiver and consent form is required from each interested person in the estate before Domiciliary Letters can be issued to the Personal Representative. If the waiver and consent cannot be obtained and there is a Will nominating a personal representative willing to act, a hearing before the Probate Registrar will be required to open the estate.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Check the appropriate boxes on Line 5 and insert the dates, as applicable.
- If there is a Will, check the box on Line 6 and insert the date of the Will and date of any Codicil to the Will.
- In line 7 insert the name of the person seeking to be appointed as Personal Representative.
- The name of each interested person or beneficiary must be printed or typed in the box for this purpose and each must sign and date the form.
- Verification of any person's authority to act on behalf of another, i.e.: guardian, agent, etc., must accompany the Waiver and Consent.
- More than one interested person may sign on one form

Fill in the "Form completed by" box.



If there is no Will, informal administration will be permitted only if all interested persons request or consent in writing to informal administration and the appointment of the same person as personal representative. Any disagreement requires the use of formal probate, which requires hiring an attorney.

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT


Name

AKA Bill Elliot

**Waiver and Consent
(Informal Administration)**

Case No. _____

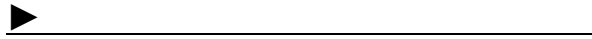
1. I am by law an interested person in this estate.
2. I am not a minor.
3. I have not been found incompetent and I do not have a guardian.
4. I waive any further notice of the hearing on the application for informal administration. I enter my appearance in this matter, and consent to the requests made in the application for informal administration.
5. I have received a list of all interested persons, and *(Choose one)*
 - a copy of the will dated October 1, 2020 and codicil(s) *(if any)*, dated _____.
 - a notice of the nature and amount of the bequest contained in the will dated _____ or codicil(s) *(if any)*, dated _____.
 - decedent died leaving no will.
6. I consent to the admission of the will dated October 1, 2020 and codicil(s) *(if any)*, dated _____.
7. I consent to the appointment of Mary Smith as personal representative(s) in this estate.
8. Other: _____


 Signature
Mary Smith, individually and as nominated PR
 Name Printed or Typed
555 Blank Street, Someplace, WI 51111
 Address
M.Smith.Address@email.com 715-999-9999
 Email Address Telephone Number

 Date State Bar No. (if any)


 Signature
John Miller, by his Guardian Ad Litem, George Johnson
 Name Printed or Typed
200 First Street, Someplace, WI 51111
 Address
G.Johnson@email.com 715-999-1234
 Email Address Telephone Number

 Date State Bar No. (if any)


 Signature
Susan Brown
 Name Printed or Typed
400 Second Street, Someplace, WI 51111
 Address
S.Brown@email.com 715-999-7777
 Email Address Telephone Number

 Date State Bar No. (if any)


 Signature
Jane Jones by her Guardian of the Estate Jacob Jones
 Name Printed or Typed
100 Third Street, Someplace, WI 51111
 Address
Jacob.Jones@email.com 715-999-6666
 Email Address Telephone Number

 Date State Bar No. (if any)

▶ _____
Signature

Name Printed or Typed

Address

Email Address Telephone Number

Date State Bar No. (if any)

▶ _____
Signature

Name Printed or Typed

Address

Email Address Telephone Number

Date State Bar No. (if any)

▶ _____
Signature

Name Printed or Typed

Address

Email Address Telephone Number

Date State Bar No. (if any)

▶ _____
Signature

Name Printed or Typed

Address

Email Address Telephone Number

Date State Bar No. (if any)

Form completed by: (Name)	
Address	
Email Address	
Telephone	Bar Number (If any)

Consent to Serve (Informal, Formal and Special Administration)

Form No.: [PR-1807](#)

Purpose of Form: To provide a written consent to serve as personal representative and acceptance of duties of the office, including designation of resident agent for service of process by a nonresident personal representative.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Read Line 1 of the Consent to Serve. You are accepting the duties and responsibilities of personal representative and agree that the court has personal jurisdiction over you in any court proceedings relating to the estate.
- This paragraph applies only if you are required by the Probate Registrar to post a bond before you become the Personal Representative.
- **If you live outside the State of Wisconsin**, check the box in No. 3 and fill in the name of the Wisconsin resident you wish to appoint to accept service of process on your behalf if that becomes necessary. This person is then known as the "Resident Agent."

Check with the Office of Register in Probate to see if you must sign this form prior to meeting with the Registrar or if you must wait until you meet with the Registrar to open the estate.

On the bottom portion of the form: Fill in the "Form completed by" box.



A Resident Agent is only required if a Personal Representative lives outside the State of Wisconsin. If you have to appoint a Wisconsin resident as your "Resident Agent," then that person must sign the bottom of this form, including his or her address and the date of signing.

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT

Name

aka Bill Elliot

Consent to Serve
 Informal Administration
 Formal Administration

Case No. _____

1. I consent to serve as personal representative special administrator of this estate. I accept the duties, submit personally to the jurisdiction of the court in any proceeding relating to the estate that may be instituted by any interested person and agree to be bound by the laws of Wisconsin.
2. I will file any required bond.
3. I am a nonresident of Wisconsin.

I appoint [Name] _____ as resident agent to accept service of process.

 Signature
Mary Smith
 Name Printed or Typed
555 Blank Street
 Address
Someplace, WI 51111 (715) 999-9999
 Email Address Telephone Number
May 25, 2022 N/A
 Date State Bar No. (if any)

Acceptance by Resident Agent

I accept appointment as resident agent for this estate to accept service of process.

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Email Address M.Smith.address@email.com	
Telephone Number (715)999-9999	Bar Number (If any) N/A

▶ _____
 Resident Agent

 Name Printed or Typed

 Address

 Email Address Telephone Number

 Date State Bar No. (if any)

Notice to Creditors (Informal Administration)

Form No.: [PR-1804](#)

Purpose of Form: To set a deadline for filing claims in an informal administration in which all interested persons have signed waivers consenting to informal administration.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Line 2: fill in decedent's date of birth, date of death, county, state and address.
- The Probate Registrar will fill in the claims date on Line 4, the location for filing the claim on Line 5.
- Fill in the "Form completed by" box.
- Your Registrar will identify the eligible newspapers for publication.

The Probate Registrar will provide a copy to the Personal Representative.

The Personal Representative is responsible for forwarding a copy of the Notice to Creditors to the newspaper for publication. It must be sent promptly, as the first publication must occur within 15 days of the date the Probate Registrar signed the Notice to Creditors. Failure to do so will result with having to resubmit the Notice to Creditors.

The Personal Representative is also responsible for serving a copy of the Notice to Creditors to "all known or reasonably ascertainable creditors," as indicated on the form.



Check with your Probate Registrar as to which newspapers are available for publication and how to deliver the Notice of Creditors to the newspaper.

STATE OF WISCONSIN, CIRCUIT COURT, DECEDENT'S COUNTY COUNTY

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOTT

Name

Notice to Creditors (Informal Administration)

Aka Bill Elliot

Case No. _____

PLEASE TAKE NOTICE:

- 1. An application for informal administration was filed.
2. The decedent, with date of birth December 30, 1940 and date of death January 10, 2022, was domiciled in Decedent's County County, State of Wisconsin, with a mailing address of 123 Something Street, Someplace, WI 51111.
3. All interested persons waived notice.
4. The deadline for filing a claim against the decedent's estate is [Date] _____.
5. A claim may be filed at the Decedent's County County Courthouse, Address _____, Wisconsin, Room ###.

Form completed by: (Name) Mary Smith
Address 555 Blank Street, Someplace, WI 51111
Telephone (715) 999-9999 Bar Number (If any) N/A

DO NOT PRINT the following text when publishing this notice.

Notice to Newspaper and Personal Representative:

Notice must be given by publication of this notice in the following newspaper: County's Official Paper once a week for three consecutive weeks; the first publication date must be within 15 days from the date of this notice.

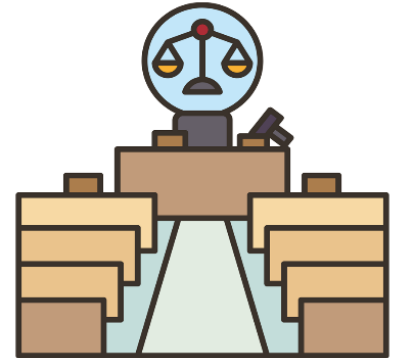
The personal representative is responsible for providing the deadline for filing a claim against the decedent's estate to all known or reasonably ascertainable creditors.

Notice Setting Time to Hear Application and Deadline for Filing Claims

(Informal Administration)

Form No.: [PR-1805](#)

Purpose of Form: To give notice to interested persons of the hearing time and date on the Application for Informal Administration; to give notice to creditors and set the deadline for filing claims. If the decedent did not have Will, this form cannot be used. You must then have Waiver and Consents from ALL interested persons, or you must proceed with a formal administration.



Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Line 2: fill in decedent's date of birth, date of death, county, state and address.
- The Probate Registrar will fill in the necessary information on Line 3, claims date on Line 4, the location for filing the claim on Line 5.
- In the lower left-hand corner of the form fill in the name, address and telephone number of the Personal Representative.
- Your Registrar will identify the eligible newspapers for publication.

The Applicant is responsible for

- Mailing a copy of this Notice, a copy of the Application for Informal Administration, and a copy of the Will and Codicil (if any) to all interested persons.
- Mailing a copy of this Notice to "all known or reasonably ascertainable creditors," as indicated on the form.
- Completing an Affidavit of Service (Probate) PR-1817 indicating when a copy of this Notice, Application for Informal Administration and Will and Codicil were provided to all interested persons.

- Forwarding a copy of this Notice to the newspaper for publication. It must be delivered to the newspaper promptly, as the first publication must occur within 15 days of the date the Probate Registrar signed the Notice.

If there are persons interested in the estate but you do not know their names and/or addresses, on line 6 of this form, check the box and insert the names of the persons who are unknown for example: unknown heirs of John Miller or unknown issue of Joseph Miller; father of Joseph A. Miller; grandfather of John Miller; a specific person (for example, James Smith) has no known address. Do not check this box unless you are missing addresses and/or names and addresses of unknown persons. A Guardian ad Litem may be required to represent these unknown persons. The Probate Registrar will tell you if this is a requirement.

STATE OF WISCONSIN, CIRCUIT COURT, (DECEDENT'S COUNTY) COUNTY

IN THE MATTER OF THE ESTATE OF

Amended

William Elliott
Name

Notice Setting Time to Hear Application and Deadline for Filing Claims (Informal Administration)

AKA Bill Elliot

Case No.

- 1. An application for informal administration was filed.
2. The decedent, with date of birth December 30, 1940 and date of death January 10, 2022 was domiciled in (decedent's county) County, State of , with a mailing address of 123 Something Street, Someplace, WI 51111.
3. The application will be heard at the (decedent's county) County Courthouse, (decedent's city), Wisconsin, Room , before , Probate Registrar, on [Date] at [Time].

You do not need to appear unless you object. The application may be granted if there is no objection.

- 4. The deadline for filing a claim against the decedent's estate is [Date].
5. A claim may be filed at the Decedent's County County Courthouse, Someplace, Wisconsin, Room .
6. This publication is notice to any persons whose names or address are unknown.

*DO NOT PRINT the following if left blank:

* The names or addresses of the following interested persons (if any) are not known or reasonably ascertainable:

If you require reasonable accommodations due to a disability to participate in the court process, please call prior to the scheduled court date. Please note that the court does not provide transportation.

Please check with person named below for exact time and date.

Form completed by: (Name) Mary Smith
Address 555 Blank Street, Someplace, WI 51111
Telephone Number (715) 999-9999 Bar Number (If any) N/A

DO NOT PRINT the following text when publishing this notice.

Notice to Newspaper and applicant:

Notice must be given by publication of this notice in the following newspaper: County's Official Newspaper once a week for three consecutive weeks; the first publication date must be within 15 days from the date of this notice.

The applicant is responsible for providing a copy of this notice, a copy of the will and codicils (if any) or notice of the nature and amount of devise or bequest to all interested persons

1. by mailing at least 20 days before the hearing; **OR**
2. by personal service at least 10 days before the hearing.

The applicant/personal representative is responsible for providing the deadline for filing a claim against the decedent's estate to all known or reasonably ascertainable creditors.

PR-1805, 10/10 Notice Setting Time to Hear Application and Deadline for Filing Claims (Informal Administration)

§§859.01, 859.07, 865.05, 879.03 and 879.05, Wisconsin Statutes

This form shall not be modified. It may be supplemented with additional material.

Page 44 of 91

Statement of Informal Administration

Form No.: [PR-1808](#)

Purpose of Form: To grant the Application for Informal Administration and allow Domiciliary Letters to be issued to the proposed Personal Representative.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

Page 1

- In Line 4, place a check in the appropriate box:
 - Check the first box if notice to interested persons had to be published.
 - Check the second box if all interested persons signed a Waiver and Consent form
- In Line 5, insert the date of death and:
 - Check the box if there is no Will.
 - Check the box if there is a Will and insert the date of the Will and codicil.
 - Check the appropriate box indicating where the Will is located.
- In Line 6, insert the name of the nominated Personal Representative.
- Read Line 7 and check the appropriate box.

Page 2

Below the words "THE PROBATE REGISTRAR STATES:"

- In Line 2, if there is a Will, insert the date of the Will.
- In Line 3, if there is a Codicil, insert the date of the Codicil.
- In Line 4, insert the name of the nominated Personal Representative and check the appropriate box about a bond.
- In Line 5, if Letters of Trust must also be issued, insert the name of the Trustee and check the appropriate box concerning a bond

Fill in the "Form completed by" box.

The Probate Registrar will insert any additional information required on this form and sign and date it.



Complete this form with the best of your ability. The Registrar will review and complete as necessary.

STATE OF WISCONSIN, CIRCUIT COURT, DECEDENT'S COUNTY COUNTY

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT
Name

Statement of Informal Administration

AKA Bill Elliot

Case No. 2022PR000111

An Application for Informal Administration was filed.

THE PROBATE REGISTRAR FINDS:

1. The application is complete, including verification.
2. The applicant is an interested person.
3. The court has jurisdiction and is the proper venue.
4. The requests and consents regarding use of informal administration are complete and notice is
 - given to all persons entitled to notice.
 - waived.
5. The decedent died on [Date] January 10, 2022, leaving
 - no will.
 - A. a will dated October 1, 2020; and codicil(s) (if any) dated _____; that
 - B.
 - are in possession of the court
 - accompanied the application
 - were probated elsewhere and an authenticated copy accompanies the application

and is a valid uncontested document(s) executed in compliance with the statutes and does not expressly prohibit informal administration.

6. The nominated personal representative(s) Mary Smith
_____ are not disqualified by law or otherwise deemed unsuitable.

7. No administration is pending either before the court or in another jurisdiction, *OR*
 Administration is pending either before the court or in another jurisdiction and no demand was made for formal administration. Proof of probate accompanies the application.

Other: The Will nominated Albert Elliott, as personal representative. He has declined to act.

8.

THE PROBATE REGISTRAR STATES:

1. The application for informal administration is granted.

The will dated October 1, 2020 is admitted.

2.

The codicil(s) (if any) dated _____ are admitted.

3.

4. Domiciliary letters are issued to Mary Smith
 and no bond is required.
 upon filing and acceptance of a signature bond. a surety bond in the sum of \$ 200,000.00.

- Letters of trust are issued to Mary Smith
 5. for the following trust: Trust under the Will of William Elliott f/b/o John Miller,
 and no bond is required.
 upon filing and acceptance of a signature bond. a surety bond in the sum of \$ 10,000.00.

Other: _____

6.

See attached for any additional trusts.

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Telephone Number (715) 999-9999	Bar Number (If any) N/A

Domiciliary Letters

Form No.: [PR-1810](#)

Purpose of the Form: To provide written evidence that a person has been authorized by the court to act as Personal Representative on behalf of the estate.

Directions:

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.



Certified copies of the Domiciliary Letters are available for a fee from the Office of Register in Probate.

- Fill in the section after "To:" with the name and address of the Personal Representative.
- Fill in the decedent's date of birth, date of death, county and state.



Co-Personal

Representative are required to act jointly unless the Will allows them to serve independently.

Fill in the "Form completed by" box.

STATE OF WISCONSIN, CIRCUIT COURT, DECEDENT'S COUNTY

COUNTY

Amended

IN THE MATTER OF THE ESTATE OF

WILLIAM ELLIOT

Name

AKA Bill Elliot

Domiciliary Letters

Informal Administration

Formal Administration

Case No. 2022PR000111

To: Mary Smith
555 Blank Street
Someplace, WI 51111

The decedent, with date of birth December 30, 1940 and date of death January 10, 2022, was domiciled in Decedent's County County, State of Wisconsin.

You are granted domiciliary letters with general powers and duties of a personal representative.

You are authorized to administer the estate as required by law.

Other: _____

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Telephone Number (715) 999-9999	Bar Number (If any) N/A

Checklist for Closing an Informal Estate Administration

<input type="checkbox"/>	<p>Affidavit of Service (Probate) (PR-1817)</p> <p>Stating:</p> <ul style="list-style-type: none"> • A copy of Will/Application/Notice was mailed to all interested persons who have not signed a Waiver and Consent (PR-1803). • The Notice to Creditors or Notice Setting Time was sent to creditors if any creditor claims able to file after claims date. • A copy of the Inventory was mailed to all interested persons. • A copy of the Estate Account was mailed to all interested persons.
<input type="checkbox"/>	<p>Proof of Publication (Obtained from newspaper where the Notice was published.)</p>
<input type="checkbox"/>	<p>Inventory (with schedules) (PR-1811)</p> <p>A filing fee of .2% (assets subject to probate x .002) is required when filing the inventory document within 6 months from date Personal Representative is appointed unless time to file has been shortened by Notice of Estate Deadlines or lengthen by an approved extension.</p>
<input type="checkbox"/>	<p>Final Estate Account (Informal and Formal Administration) with schedules (PR-1814) If there are additional found assets, there may be an additional filing fee.</p>
<input type="checkbox"/>	<p>Estate Receipt (PR-1815)</p> <p>Each distributee must provide a receipt for all distributions received. Estate receipt form is used to demonstrate that claims have been paid in full and satisfied.</p>
<input type="checkbox"/>	<p>Closing Certificate for Fiduciaries (Obtained from the State of Wisconsin after filing a Fiduciary Tax Return and/or Schedule CC)</p>
<input type="checkbox"/>	<p>Statement of Personal Representative to Close Estate (Informal Administration) (PR-1816)</p>

Inventory (Informal and Formal Administration)

Form No.: [PR-1811](#)

Purpose of Form: To identify any property and assets in which the decedent had any interest and list the fair market value of such interests on the date of death that are subject to estate administration.

Directions:

Complete Page 2 first; your totals from Page 2 are carried over to the summary section of Page 1

PAGE 1.

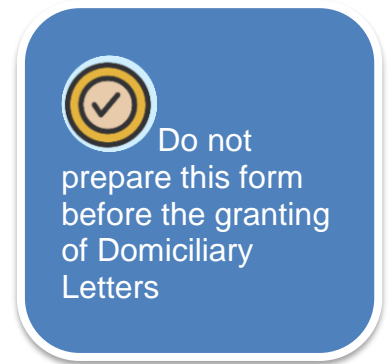
Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number assigned.

- Fill in date of death where designated.
- Fill in total value of property/assets subject to administration (from page 2).
- Fill in total value of encumbrances, liens or other charges (from page 2).
- Fill in net value of property/assets subject to administration (from page 2).
- Sign inventory in front of a notary public (after all Schedules are completed on page 2).
- Fill in the "Form completed by" box.

PAGE 2.

- Fill in case number.
- List/describe, by numbered item the property subject to administration and fair market values as of date of death. Include accrued interest and dividends, if any.
- Identify each item of property that is marital property. Remember for married persons, each owns one half of the items of marital property regardless of title. You may want to consult a lawyer regarding this issue.
- List with each item of property any encumbrance, lien, or charge.
- This is not meant for listing "charge cards." A "charge" is something like a lien or encumbrance on a specific item of property. A mortgage, for example, is an encumbrance on real estate.
- Even if the charge exceeds the value, the net value of the asset cannot be less than -0-
- Attach supporting schedule, if necessary - read the form carefully.

The second Inventory example on page 53 shows how martial property would be classified.



STATE OF WISCONSIN, CIRCUIT COURT, Decedent's County COUNTY

SAMPLE

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOTT
Name

Inventory

Informal Administration
 Formal Administration

AKA Bill Elliott

Case No. 2022PR000011

UNDER OATH, I STATE:

As personal representative, I certify that to the best of my knowledge this inventory with schedules includes:

1. All property subject to administration.
2. Any encumbrance, lien or other charge against each item of property.
3. Identification of marital property, if any.

I will furnish a copy of this inventory to all persons interested as required by law.

SUMMARY OF PROPERTY SUBJECT TO ADMINISTRATION (Value of Decedent's Interest on date of death)	Date of Death 04/10/2022	
Total value of property subject to administration	\$	446,432.39
Minus total value of encumbrances, liens or other charges against each item of property	\$	(307,206.37)
Net Value of Property Subject to Administration (cannot be less than \$0)	\$	139,226.02

Provide itemized lists on attached schedules and clearly designate any marital property interests.

Note: A statutory filing fee must accompany this form.

State of Wisconsin

County of _____

Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed

My commission/term expires: _____

This notarial act involved the use of communication technology.

State of _____

County of _____

Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed

My commission/term expires: _____

This notarial act involved the use of communication technology.

Form completed by: (Name) Mary P. Smith	
Address 555 Blank Street, Someplace, WI 51111	
Email Address <u>M.Smith.Address@email.com</u>	
Telephone Number 262-666-5555	Bar Number (If any) N/A

► _____
Personal Representative

Mary P. Smith
Name Printed or Typed
555 Blank St., Someplace, WI51111
Address

M.Smith.Address@email.com 262-666-5555
Email Address Telephone Number

November 15, 2022
Date State Bar No. (if any)

► _____
Personal Representative

Name Printed or Typed

Address

Email Address Telephone Number

Date State Bar No. (if any)

Number	Supporting Inventory Schedules (Description of property including digital property as defined under §711.03(10), Wis. Stats., legal description of real estate, and related encumbrances, liens or other charges against each item.) Clearly designate marital property.	Value of Decedent's Interest on Date of Death
1.	Lot 1, Block 2 in Avondale Gardens Subdivision, Section 4, Township 12 South, Range 22 East, in the City of Someplace, County of Decedent, State of Wisconsin. a/k/a 123 Someplace Street, Someplace, WI 51111 Solely in the name of William Elliott valued as of date of death Mortgage with Big Bank, N.A. in the amount of \$175,625.32 2nd Mortgage with Prairie Credit Union in the amount of \$96,054.69	\$350,000.00
2.	Savings Account with Big Bank N.A. in the name of William Elliott, value as of date of death	\$12,262.82
3.	Checking Account with Prairie Credit Union in the name of William Elliott, valued as of date of death	\$10,525.98
4.	2018 GMC Yukon VIN 1TY125VX121111 in the name of William Elliot, Blue Book value as of date of death Car loan with Prairie Credit Union in the amount of \$24,251.36	\$27,625.00
5.	250 shares of AT&T stock at \$21.17/share with ABC Investments in the name of William Elliott, with a date of death value of	\$5,292.50
6.	175 shares of Apple stock at \$139.77/share with ABC Investments in the name of William Elliott, with a date of death value of	\$2,376.09
7.	2019 Polaris Sportsman Hunt edition in the name of William Elliott, value as of date of death	\$4,725.00
8.	Metropolitan Life Insurance policy #6521589452 payable to the estate of William Elliott, value as of date of death	\$10,000.00
9.	Collection of antique duck decoys appraised value as of date of death	\$1,250.00
10.	Fishing equipment and tackle appraised value as of date of death	\$375.00
11.	Tundra long range hunting rifle appraised value as of date of death	\$3225.00
12.	2014 Ford Explorer VIN 6PR222MN151515 in the name of William Elliott, Blue Book Value as of date of death Car Loan with Prairie Credit Union in the amount of \$14,216.33 (deductible amount is \$11,275.00)	\$11,275.00
13.	Personal property (Household furnishings, tools, yard equipment, jewelry) value as of date of death	\$7,500.00

STATE OF WISCONSIN, CIRCUIT COURT, Decedent's County COUNTY

**MARITAL
PROPERTY
SAMPLE**

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOTT
Name

Inventory

Informal Administration

Formal Administration

AKA Bill Elliott

Case No. 2022PR000011

UNDER OATH, I STATE:

As personal representative, I certify that to the best of my knowledge this inventory with schedules includes:

1. All property subject to administration.
2. Any encumbrance, lien or other charge against each item of property.
3. Identification of marital property, if any.

I will furnish a copy of this inventory to all persons interested as required by law.

SUMMARY OF PROPERTY SUBJECT TO ADMINISTRATION (Value of Decedent's Interest on date of death)	Date of Death 4/10/2022	
Total value of property subject to administration	\$	446,432.39
Minus total value of encumbrances, liens or other charges against each item of property	\$	(307,206.37)
Net Value of Property Subject to Administration (cannot be less than \$0)	\$	139,226.02

Provide itemized lists on attached schedules and clearly designate any marital property interests.

Note: A statutory filing fee must accompany this form.

State of Wisconsin
County of _____
Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed _____
My commission/term expires: _____

This notarial act involved the use of communication technology.

State of _____
County of _____
Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed _____
My commission/term expires: _____

This notarial act involved the use of communication technology.

► _____
Personal Representative

Mary P. Smith
Name Printed or Typed
555 Blank St., Someplace, WI51111
Address

M.Smith.Address@email.com 262-666-5555
Email Address Telephone Number

November 15, 2022
Date State Bar No. (if any)

► _____
Personal Representative

Name Printed or Typed

Address

Email Address Telephone Number

Date State Bar No. (if any)

Form completed by: (Name)
Mary P. Smith

Address
555 Blank Street
Someplace, WI 51111

Email Address
M.Smith.Address@email.com

Telephone Number 262-666-5555	Bar Number (If any) N/A
----------------------------------	----------------------------

Number	Supporting Inventory Schedules (Description of property including digital property as defined under §711.03(10), Wis. Stats., legal description of real estate, and related encumbrances, liens or other charges against each item.) Clearly designate marital property.	Value of Decedent's Interest on Date of Death
1.	Lot 1, Block 2 in Avondale Gardens Subdivision, Section 4, Township 12 South, Range 22 East, in the Town of Someplace, County of Someplace, State of Wisconsin. a/k/a 2525 West Rosemary Court, Someplace, WI 53149 Solely in the name of James R. Smith valued as of date of death This is marital property Mortgage with Big Bank, N.A. in the amount of \$175,625.32 2 nd Mortgage with Prairie Credit Union in the amount of \$96,054.69	\$350,000.00
2.	Savings Account with Big Bank N.A. value as of date of death This is marital property	\$12,262.82
3.	Checking Account with Prairie Credit Union valued as of date of death This is marital property	\$10,525.98
4.	2018 GMC Yukon Blue Book value as of date of death This is marital property Car loan with Prairie Credit Union in the amount of \$24,251.36	\$27,625.00
5.	250 shares of AT&T stock at \$21.17/share with ABC Investments with a date of death value of This is marital property	\$5,292.50
6.	175 shares of Apple stock at \$139.77/share with ABC Investments with a date of death value of This is marital property	\$2,376.09
7.	GMT Engineering LLC member interest, appraised value as of the date of death This is marital property	\$275,000.00
8.	Metropolitan Life Insurance policy #6521589452 payable to the estate, value as of date of death	\$10,000.00
9.	Collection of antique duck decoys appraised value as of date of death This is marital property	\$1,250.00
10.	Tundra long range hunting rifle appraised value as of date of death This is marital property	\$3,225.00
11.	Fishing equipment and tackle appraised value as of date of death this is marital property	\$375.00
12.	2019 Polaris Sportsman Hunt edition value as of date of death This is marital property	\$4,725.00

13.	<p>Personal property (Household furnishings, tools, yard equipment, jewelry) value as of date of death This is marital property</p> <p style="text-align: center;">Total encumbrances, liens or other charges:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Big Bank Mortgage:</td> <td style="text-align: right;">\$175,625.32</td> </tr> <tr> <td>Prairie Credit Union 2nd Mortgage</td> <td></td> </tr> <tr> <td>\$96,054.69</td> <td></td> </tr> <tr> <td>Prairie Credit Union Car Loan</td> <td style="text-align: right;">\$24,251.36</td> </tr> <tr> <td>Prairie Credit Union Car Loan</td> <td style="text-align: right;">\$14,216.33</td> </tr> <tr> <td>Total</td> <td style="text-align: right;">\$310,147.70</td> </tr> <tr> <td>Less adjustment for car loan in excess of value of asset</td> <td style="text-align: right;">(2,941.33)</td> </tr> <tr> <td> Total Deductible encumbrances</td> <td style="text-align: right;"> \$307,206.37</td> </tr> </table>	Big Bank Mortgage:	\$175,625.32	Prairie Credit Union 2nd Mortgage		\$96,054.69		Prairie Credit Union Car Loan	\$24,251.36	Prairie Credit Union Car Loan	\$14,216.33	Total	\$310,147.70	Less adjustment for car loan in excess of value of asset	(2,941.33)	 Total Deductible encumbrances	 \$307,206.37	\$7,500.00
Big Bank Mortgage:	\$175,625.32																	
Prairie Credit Union 2nd Mortgage																		
\$96,054.69																		
Prairie Credit Union Car Loan	\$24,251.36																	
Prairie Credit Union Car Loan	\$14,216.33																	
Total	\$310,147.70																	
Less adjustment for car loan in excess of value of asset	(2,941.33)																	
 Total Deductible encumbrances	 \$307,206.37																	

Estate Account

Form No.: [PR-1814](#)

Purpose of the Form: For the Personal Representative to make a written accounting of all receipts, expenses and distributions affecting the property subject to administration.

Directions:

PAGE 1.

Type or print the name of decedent's county at the top of the form and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the appropriate box (interim), (final) or (supplemental) and the box for "Informal Administration." Fill in the case number assigned.

Check the box for personal representative and fill in the date of death of the decedent and the date on which you are completing the form.

Start on page three.

Page one is a summary of the total figures from the schedules located on page 3.

Under "Receipts:"

- Inventoried Assets: Insert the Net Value of Property figure from the Inventory on file;
- Schedule A – Added Property: List the total of any property found after filing the Inventory other than dividends, interest or capital gains; an additional filing fee may be required. (adds to the value of the property subject to administration)
- Schedule B – Dividends: List the total of any dividends received and not already listed in the Inventory;
- Schedule C – Interest: List the total of any interest received and not already listed in the Inventory;
- Schedule D – Capital Gains/Losses: List the total of any capital gains or losses;
- Schedule E – Other Receipts: List the total of any other property received and not accounted for in Schedules A-D.
- Balancing Totals: Add all the amounts in the "TOTAL" column regarding receipts (Schedules A-E) and enter it in the space next to "Total".

Under "Disbursements:" Paid by Estate Assets:

- Schedule F – Funeral Expenses: List the total of the funeral expenses.
- Schedule G – Debts of Decedent: List the total of all debts.

- Schedule H – Claims: List the total of all claims.
- Schedule I – Taxes Paid: List the total of all taxes.
- Schedule J – Interest Paid: List the total of all interest.
- Schedule K – Administration Expenses: List the total of all administrative expenses.
- Schedule L – Other payments: List the total of all other bills paid other than attorney fees.
- Schedule M – Distributions Paid to Date: List the total of all partial payments made to each individual beneficiary (or heir, if there has been no Will admitted to administration) up to the date of preparing this Estate Account.

Total Disbursements: Add all the amounts in the “TOTAL” column regarding disbursements

- (Schedules F-M) and enter it in the space next to the “total disbursements”.
- Schedule N – Assets on Hand: Value of assets that remain to be distributed.
- Balancing Totals: Add the total disbursements and the total assets on hand and enter that total as the “TOTAL” for the disbursements column.

Proposed Distribution of Assets on Hand (Schedule O): Should be the same figure as shown in Schedule N, above.

- List the total of all payments to be made to each individual beneficiary (or heir, if there has been no Will admitted to administration).
- “Total Fees:” Insert the amount of any personal representative fees, guardian ad litem fees, special administrator fees, and attorney fees (if none, state) paid during the administration of the estate.

The Personal Representative or Co-Personal Representatives must sign this document in front of a Notary Public.



The totals for Receipts and for Disbursements and Assets on Hand **MUST** be the same. If they are not, there is an error.

PAGE 2.

- Insert the case number.
- Provide the information required in the “Form Completed by” box.
- Insert the names of the interested persons, their addresses and, if minors, their dates of birth.

PAGE 3.

- Insert the case number.
- List Schedules A-O: List in detail the amounts for each schedule, for example:

Schedule F – Funeral Expenses:

Sunset Monuments	\$2,700.00
John’s Funeral Home.....	5,580.47
The total of this Schedule.....	\$8,280.47

(This should then be inserted on Page 1 of the Estate Account in the Disbursements column, Funeral Expenses Schedule F.)

IN THE MATTER OF THE ESTATE OF

William Elliott
Name

a/k/a Bill Elliott

Amended

Interim

Final

Supplemental
Estate Account

Informal
Administration

Formal Administration

Case No. 2022PR000011

UNDER OATH I VERIFY:

I am the personal representative special administrator of this estate and this estate account is true and correct. The following is my account of the administration of this estate from [Date of Death or Date of prior estate account] 04/10/2022 to [Date] 03/22/2023. **List interested persons on page 2.**

RECEIPTS	TOTAL	DISBURSEMENTS	TOTAL
Net Value of property, subject to administration from Inventory (or assets on hand as of last estate account)	139,226.02	Funeral Expenses Schedule (F)	15,877.26
Added Property to which the decedent was entitled to on Date of Death not included in Inventory or prior Estate Account, including refunds. Schedule (A)	3,250.00	Debts of Decedent (G)	351.36
Dividends (B)	181.88	Claims (including those by judgment) (H)	7,586.98
Interest (C)	4.26	Taxes Paid (I)	9,771.50
Capital Gains (Losses) (D)	(\$10,620.53)	Interest Paid (J)	7,437.09
Other Receipts (E)		Administration Expenses (K)	3,358.65
		Other Payments (L)	2,278.27
		Distributions Paid to Date (M)	40,000.00
		TOTAL DISBURSEMENTS	86,661.11
		Assets on Hand (N)	45,380.52
TOTAL	132,041.63	TOTAL	132,041.63

Totals in each column must be the same.	
Proposed distribution of Assets on Hand (Schedule O)	132,041.63
Total Fees paid during administration:	
Personal Representative:	\$8,602.61
Guardian Ad Litem:	\$375.00
Special Administrator:	
Attorney:	

State of Wisconsin
County of Wherever
Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed
My commission/term expires: _____

This notarial act involved the use of communication technology.

Personal Representative/Special Administrator
Mary P. Smith
Name Printed or Typed
555 Blank Street, Someplace, WI 51111
Address

marysmith@internet.com 715-999-9999
Email Address Telephone Number

Date State Bar No. (if any)

State of _____
 County of _____
 Subscribed and sworn to before me on _____

 Notary Public/Court Official

 Name Printed or Typed

My commission/term expires: _____
 This notarial act involved the use of communication technology.

 Personal Representative/Special Administrator

 Name Printed or Typed

 Address

 Email Address Telephone Number

 Date State Bar No. (if any)

Form completed by: (Name)	
Address	
Email Address	
Telephone Number	Bar Number (If any)

ESTATE ACCOUNT SUPPORTING SCHEDULE

List of Interested Persons
 The names and mailing addresses of all interested persons are as follows:
 (For any person with disabilities, also list any guardian of estate; for any person in the military, also list attorney or attorney in fact; and for any minor, list date of birth.)

Name	Mailing Address	If Minor, Date of Birth
Mary Smith, individually and as Trustee	555 Blank Street, Someplace, WI 51111	June 1, 2015
John Miller	100 First Street, Someplace, WI 51111	
George Johnson, Guardian ad Litem for John Miller	200 First Street, Someplace, WI 51111	
Susan Brown	100 Second Street, Someplace, WI 51111	
Jane Jones	100 Third Street, Anyplace, WI 52222	
Jacob Jones, Guardian of Estate for Jane Jones	100 Third Street, Anyplace, WI 52222	

Schedule (A - O)	Estate Account Supporting Schedules (List details of each schedule)	Amount
A.	Refund from Hartland Insurance Company for car insurance	\$175.00
A.	Refund from IRS	\$2,200.00
A.	Refund form Wisconsin Dept. of Revenue	\$875.00
B.	AT&T stock	\$53.52
B.	Apple stock	\$128.36
C.	Savings account at Big Bank, N.A.	\$3.63
C.	Checking Account at Prairie Credit Union	\$0.52
C.	Estate checking account at Prairie Credit Union	\$0.11
D.	Capital Loss from sale of 2525 W. Rosemary Ct., Anywhere, WI	(\$11,056.32)
D.	Capital Gain from sale of GMT Engineering LLC	\$26,525.00
D.	Capital Gain from sale of AT&T stock	\$625.00
D.	Capital Loss from Sale of Apple stock	(\$189.21)
F.	Shady Pines Funeral Home	\$13,251.52
F.	Amazing Grace Cemetery and Mausoleum	\$750.00
F.	Rock of Ages Monuments	\$1,250.00
F.	Williams Restaurant (funeral buffet)	\$625.74
G.	Checks written prior to death but cashed after death	\$351.36
H.	Phillips Collection service for Menard's Mastercard	\$1,256.36
H.	Dr. John Franks	\$675.00
H.	Metro Ambulance Co.	\$125.00
H.	American Express	\$5,265.99
H.	Donald's Plumbing Service	\$264.63
I	Prorated Real Estate Taxes from Closing on 2525 W. Rosemary Ct., Anywhere	\$1,315.26
I	2022 Real Estate Taxes 2525 W. Rosemary Ct., Anywhere	\$8,456.24
J.	Big Bank N.A. (first mortgage)	\$5,253.26
J.	Prairie Credit Union (second mortgage)	\$1,528.98
J.	Prairie Credit Union (car loan)	\$654.85
K.	Konkel Publications	\$61.59
K.	Inventory Filing Fee	\$828.45
K.	Filing Fee on Added Property (schedule A)	\$6.50
K.	Attorney John Findem (GAL)	\$375.00
K.	Mary Smith PR Fees	\$8,602.61
L.	WE Enegies	\$175.16
L.	Spectrum Cable Service	\$75.26
L.	Fair Market Appraisal Services	\$550.00
L.	A-1 Disposal Service	\$450.00
L.	Radiology Physicians Inc.	\$35.25
L.	Fairway Heating and Air Conditioning Inc.	\$215.35
L.	Green Yardcare and Maintenance Inc.	\$425.00
L.	Top of the Hill Water and Septic Service	\$215.00
L.	Newsome Pharmacy	\$62.25
L.	Big Bank N.A. service charges	\$50.00
L.	Prairie Credit Union check charges	\$25.00

M.	Mary P. Smith	\$10,000.00
M.	James J. Smith	\$10,000.00
M.	Jane R. Jones	\$10,000.00
M.	Judy A. Case	\$10,000.00
N.	Estate Checking Account at Prairie Credit Union	\$38,865.02
O.	Mary P. Smith	\$11,345.13
O.	Mary Smith as Trustee	\$11,345.13
O.	Susan Brown	\$11,345.13
O.	Jacob Jones as guardian of the estate for Jane R. Jones	\$11,345.13

Estate Receipt

Form No.: [PR-1815](#)

Purpose of Form: To show that creditors, heirs, beneficiaries or trustees have received what is due them from the decedent's estate.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number assigned.

- Check the "personal representative" box and describe the property covered by the issuance of the receipt. (Cash payment, items of personal property, stocks, bonds, etc.)
- Check the appropriate No. 2 box if this is a distribution to an heir/beneficiary other than a trust.
- If the receipt is for a claim against the estate, place a check in No. 3, fill in the name of the claimant and the amount of the claim.
- If this is a distribution to a living or testamentary trust, place a check in No. 4 and insert the name of the trust.

Fill in the "Form completed by" box.

Recipient signs the receipt, adding his or her address and the date signed.

NOTE: A receipt is required for all distributions in an estate.

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT

Estate Receipt

Name

Informal Administration

Aka Bill Elliot

Formal Administration

Case No. 2022PR000011

1. I received from the personal representative special administrator of this estate the following:

Describe items of property or monies received
Cash \$3,277.42

2. This is a partial full distribution of my share of the estate.
3. This is a full satisfaction of the claim filed by Someplace Hospital in the amount of \$3,277.42.
4. This is a distribution of funds to trust. [Identify Trust] _____.
5. Other: _____.

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Email Address M.Smith.Address@email.com	
Telephone Number (715) 999-9999	Bar Number (If any)

▶ _____
Signature

Someplace Hospital
Name Printed or Typed

100 Twelfth Street, Someplace, WI 51111
Address

Email Address

(715) 888-2222
Telephone Number

Date

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT

Estate Receipt

Name

Informal Administration

Aka Bill Elliot

Formal Administration

Case No. 2022PR000011

1. I received from the personal representative special administrator of this estate the following:

Describe items of property or monies received	
Toy Train Sets	\$ 2,500.00
100 Shares GHI Company	\$ 5,831.00
Household Furnishings, Tools, Riding Lawn Tractor, Jewelry	\$ 7,850.00
Cash - 1/4 residual share	\$ 38,709.80

2. This is a partial full distribution of my share of the estate.
3. This is a full satisfaction of the claim filed by _____ in the amount of \$_____.
4. This is a distribution of funds to trust. [Identify Trust] _____.
5. Other: I waived Personal Representative's fee

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Email Address M.Smith.Address@email.com	
Telephone Number (715) 999-9999	Bar Number (If any)

 _____
Signature

Mary Smith _____
Name Printed or Typed

555 Blank Street, Someplace, WI 51111 _____
Address

M.Smith.Address@email.com _____
Email Address

(715) 999-9999 _____
Telephone Number

_____ Date

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT

Estate Receipt

Name

Informal Administration

Aka Bill Elliot

Formal Administration

Case No. 2022PR000011

1. I received from the personal representative special administrator of this estate the following:

Describe items of property or monies received	
150 Shares EDF, Inc.	\$ 2,284.50
311 Shares XYZ Co.	\$ 4,546.82
100 Shares Ltd. Foods, Inc.	\$ 12,011.00
200 Shares ACME Corporation	\$ 4,910.00
Cash – ¼ Residual Share	\$ 38,709.82

2. This is a partial full distribution of my share of the estate.
3. This is a full satisfaction of the claim filed by _____ in the amount of \$_____.
4. This is a distribution of funds to trust. [Identify Trust] Trust under the Will of William Elliott For the Benefit of John Miller
5. Other: _____

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Email Address M.Smith.Address@email.com	
Telephone Number (715) 999-9999	Bar Number (If any)

► _____
Signature

Mary Smith, Trustee
Name Printed or Typed

555 Blank Street, Someplace, WI 51111
Address

M.Smith.Address@email.com
Email Address

(715) 999-9999
Telephone Number

_____ Date

Affidavit of Service

Form No.: [PR-1817](#)

Purpose of Form: A sworn statement indicating the names and addresses of all interested persons to whom various documents are mailed.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number assigned.

When you complete this form, you are swearing that you mailed a copy of a specific document OR documents to a certain party or parties concerned with the estate.

- Insert your name where indicated and the city and state where you live.
- Insert the mailing or service date next.
- In the "Documents Provided" section, insert the name of the document or documents that you have mailed or served. (i.e. Estate Inventory or Estate Account)
- Check the box to indicate whether the original of that document(s) is already in the estate file in the Office of Register in Probate or if a copy of that document(s) is attached to the affidavit.
- Insert the names and addresses of all the individuals/businesses/creditors to which you have mailed a copy of the document you inserted earlier in this form and state the type of service (i.e. mail, personal service).
- Fill in the "Form completed by" box.

DO NOT SIGN THIS FORM until you are in front of a Notary Public. The Probate Registrar may also witness your signature.

STATE OF WISCONSIN, CIRCUIT COURT, DECEDENT'S COUNTY COUNTY

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT

Name

**Affidavit of Service
(Probate)**

AKA Bill Elliot

Case No. 2022PR000011

I, [Name] Mary Smith of [City] Someplace, State of Wisconsin, being sworn, state that on [Date] _____, I provided copies of the following documents:

Documents Provided

Notice to Creditors

- the original of which is on file, OR
- a copy of which is attached (no original on file)

to the following named persons at the mailing address as listed:

See attached

NAME	MAILING ADDRESS	TYPE OF SERVICE***
Northwest Savings Bank	1 Northwest Plaza, Someplace, WI 51111	First Class Mail
Southeast Savings & Loan	101 South Fifth Street, Someplace, WI 51111	First Class Mail

*** TYPE OF SERVICE: Refer to Wisconsin Statutes for proper manner of service.

Type of Service:

- Personal Service
- Mail
- Certified mail return receipt requested

State of _____
County of _____
Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed

My commission/term expires: _____

This notarial act involved the use of communication technology.

Signature

Mary Smith
Name Printed or Typed

555 Blank Street, Someplace, WI 51111
Address

M.Smith.Address@email.com (715) 999-9999
Email Address Telephone Number

Date State Bar No. (if any)

Form completed by: (Name) <u>Mary Smith</u>	
Address <u>555 Blank Street, Someplace, WI 51111</u>	
Email Address <u>M.Smith.Address@email.com</u>	
Telephone Number <u>(715) 999-9999</u>	Bar Number (If any) <u>N/A</u>

Statement of Personal Representative to Close Estate

Form No.: [PR-1816](#)

Purpose of Form: To verify that the Personal Representative has completed the estate.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number assigned.

- Read paragraphs 1-3 and 5-6 and determine if you have completed all tasks.
- In No. 4, check the appropriate box and if claims have not been paid, insert the arrangements made to accommodate those unpaid claims.
- In No. 7, insert the amount of any attorney fees paid.

The Personal Representative must sign the Statement in front of a Notary Public.

The original of this document must be filed in the Office of Register in Probate.

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT
Name

**Personal Representative's
Statement to Close Estate
(Informal Administration)**

AKA Bill Elliot

Case No. 2022PR000011

I VERIFY THAT I, OR A PRIOR PERSONAL REPRESENTATIVE WHOM I HAVE SUCCEEDED:

- Gave notice to interested persons and to creditors as required by law and the time for filing claims expired prior to the date of this statement.
- Fully administered the estate by making payment, settlement, or other disposition of all claims presented, expenses of administration, reasonable funeral and burial expenses, death and other taxes, except as otherwise specified below.
- Inventoried the assets of the estate, furnished a copy of the inventory to interested persons and distributed the assets to the persons entitled to them.
- Am aware of no unpaid claims, expenses or taxes outstanding.
 Made the following detailed arrangements to accommodate any outstanding liabilities: _____ See attached
- Sent a copy of this statement to all distributees of this estate and to all creditors or other claimants of whom I am aware whose claims are neither paid nor barred.
- Furnished a full account of the administration, in writing, to all persons whose interests are affected.
- The amount of attorney fees paid or to be paid from estate assets is \$0.00.
- Understand that if no proceedings challenging this statement or otherwise involving me as personal representative are pending in the court 6 months after this statement is filed, my appointment as the personal representative terminates.

State of _____
County of _____
Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed

My commission/term expires: _____

This notarial act involved the use of communication technology.

State of _____
County of _____
Subscribed and sworn to before me on _____

Notary Public/Court Official

Name Printed or Typed

My commission/term expires: _____

This notarial act involved the use of communication technology.

► _____
Personal Representative

Mary Smith
Name Printed or Typed

555 Blank Street, Someplace, WI 51111
Address

M.Smith.address@email.com (715)999-9999
Email Address Telephone Number

Date State Bar No. (if any) N/A

► _____
Personal Representative

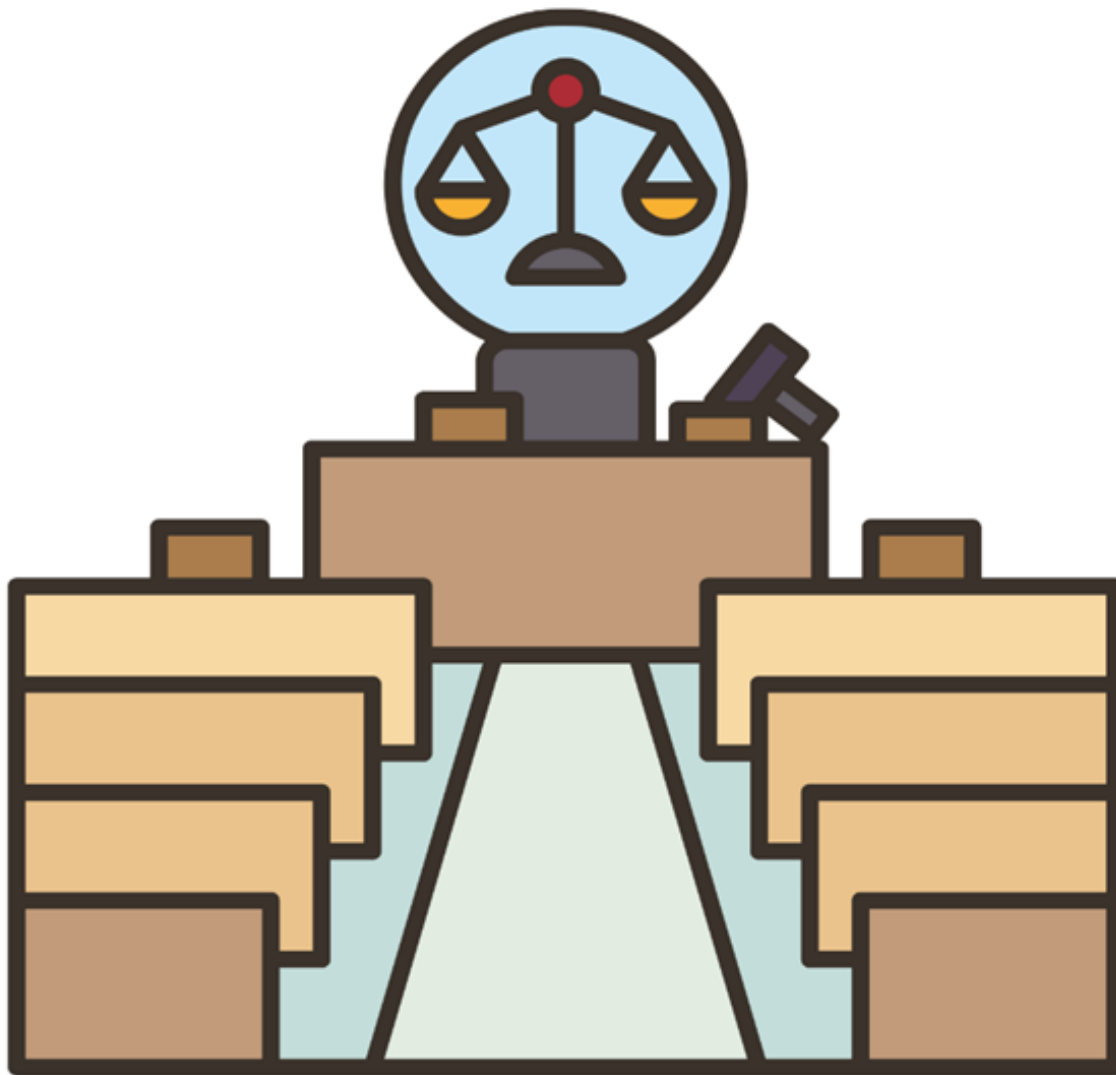
Name Printed or Typed

Address

Email Address Telephone Number

Date State Bar No. (if any)

Supplemental Forms



Declination to Serve or Resignation

Form No.: [PR-1802](#)

Purpose of the Form: To allow the person who has been nominated in the Will as personal representative or executor to decline to act as such personal representative or executor. This form may also be used if a Personal Representative, Special Administrator or Trustee must resign.

Directions for Resignation:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- In 1, check the appropriate box or boxes that apply.
- The person who is declining to act must sign and date this form where indicated and fill in the "Form completed by" box.

Directions for Resignation:

At the top of the form insert the name of the decedent's county of residence and add the decedent's name just below the words "In the Matter of the Estate of..." Check the box for "Informal Administration." Fill in the case number.

- Check the box for your title.
- Give the reason for your resignation.
- The person who is resigning must sign and date where indicated and fill in the "Form completed by" box.

STATE OF WISCONSIN, CIRCUIT COURT, (DECEDENT'S COUNTY) COUNTY

IN THE MATTER OF THE ESTATE OF

Amended

William Elliott
Name

**Declination to Serve
or Resignation**

AKA Bill Elliot

- Informal Administration**
- Formal Administration**

Case No. 2022PR000011

DECLINATION TO SERVE

1. I was named in the will or codicil of the decedent to serve as
 - personal representative.
 - testamentary trustee.
2. I have not undertaken any duties in this capacity.
3. I decline to serve in this capacity.

RESIGNATION

1. I am the
 - personal representative.
 - testamentary trustee.
 - special administrator.
2. I resign for the following reason(s): _____
3. I request that the court accept my resignation.
4. I understand that I will not be discharged until
 - A. I have completed all required duties and filed any required documents;
 - B. a successor is appointed (if needed), AND
 - C. the Court issues an order of discharge.

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Email Address M.Smith.Adress@email.com	
Telephone Number (715) 999-9999	Bar Number (If any) N/A

▶ _____
Signature

Albert Elliot
Name Printed or Typed

500 Ninth Street, Somplace, WI 51111
Address

Albert.Elliott@email.com (715) 999-5555
Email Address Telephone Number

Date State Bar No. (if any)

PR-1802, 11/19 Declination to Serve or Resignation (Informal Administration and Formal Administration) §§701.17 and 857.21, Wisconsin Statutes
This form shall not be modified. It may be supplemented with additional material.

Order Appointing Guardian ad Litem or Attorney

Form No.: [GF-131A](#)

Purpose of the Form: Appoints either Guardian ad Litem or Attorney for an individual.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Insert the name of the individual for whom a guardian ad litem or attorney will be appointed.
- Check the appropriate box for either a guardian ad litem or an attorney.
- Enter the name and address of the attorney/person who will be appointed, if known.
- If an attorney is appointed as the guardian ad litem, the fees and expenses shall be paid out of the estate assets.

STATE OF WISCONSIN, CIRCUIT COURT, (DECEDENT'S COUNTY) COUNTY

IN THE MATTER OF THE ESTATE OF:
WILLIAM ELLIOT
AKA Bill Elliot

Amended

Order Appointing
Guardian ad Litem or Attorney

Case No. 2022PR000011

A matter is pending in this court and [Individual(s)] John Miller require(s) the appointment of
a guardian ad litem.
an attorney.

THE COURT ORDERS:

1. The appointment of the following person as guardian ad litem attorney for the
above-named individual(s).

Name: George Johnson
Address: 200 First Street, Somplace, WI 51111
Telephone Number: (715) 999-1234

2. Consent to Act is is not required to be signed.

3. The Petition is denied because

4. Other:

GF-131A, 05/16 Order Appointing Guardian ad Litem or Attorney
§§48.23, 48.235, 51.60, 54.40, 55.105, 757.52, 757.48, 767.407, 813.123(3)(b), 879.23, and 879.25, Wisconsin Statutes
This form shall not be modified. It may be supplemented with additional material.

Case Caption:
IN THE MATTER OF THE ESTATE OF:

WILLIAM ELLIOTT

Consent to Act

Case No. 2022PR000011

An Order Appointing Guardian ad Litem or Attorney was filed on [Date] March 1, 2022.

I consent to my appointment as guardian ad litem attorney for John Miller.

▶ _____

Signature

George Johnson

Name Printed or Typed

200 First Street, Someplace, WI 51111

Address

G.Johnson@email.com

Email Address

(715) 999-1234

Telephone Number

Date

N/A

State Bar No. (if any)

Signature Bond (Estate or Trust Proceedings)

Form No.: [PR-1809A](#)

Purpose of Form: Guarantees compliance with the terms of the bond, and is the proposed personal representative's promise to faithfully perform his or her duties in the administration of the estate.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Principal and Surety can be either the same individual or separate individuals. The Principal is the personal representative. The surety is the individual willing to be personally liable to the estate should there be a loss of assets as a result of wrongdoing or mismanagement.
- Insert the amount of bond as determined by the Probate Registrar (based on the estimated value of the estate).
- Check the box which corresponds with your title.
- The Principal must sign where indicated and the signature must be witnessed by two people.
- Any Surety must sign where indicated, in front of a Notary Public.
- In the lower left-hand corner of the form, complete the "Form completed by" box.
- If the bond is approved, the Probate Registrar will complete the remainder of the form.

STATE OF WISCONSIN, CIRCUIT COURT, (DECEDENT'S COUNTY) COUNTY

IN THE MATTER OF THE ESTATE OF

WILLIAM ELLIOT
Name

For the following trust:

Trust under the Will of William Elliott f/b/o John Miller
June 1, 2009
Date of Birth

Amended

Signature Bond In Estate or Trust Proceedings

Case No. 2022PR000011

I/we [Names] Mary Smith, principal(s) and [Names] Larry Smith, surety(ies) are liable to the Circuit Court in the sum of \$200,000.00 for which payment I/we bind my/ourselves and my/our estate(s), jointly and severally.

If the principal faithfully performs duties as

- personal representative; special administrator; testamentary trustee; petitioner in summary settlement/assignment; assignee in summary assignment, to satisfy liability to creditors or other persons interested in the estate; Other:

then this bond obligation shall be void; otherwise it shall remain in full force and effect.

Witnessed By:

Signature
Signature

SIGNATURE OF PRINCIPAL
Signature of Principal
Signature of Principal

I, being sworn as a surety, state that I am an adult resident of Wisconsin, residing in County. I am financially responsible for the actions of the principal(s) in the amount of this bond. I shall provide satisfactory evidence to the designated court officer.

State of
County of
Subscribed and sworn to before me on
Notary Public/Court Official
Name Printed or Typed

My commission/term expires:

This notarial act involved the use of communication technology.

Signature of Surety
Larry Smith
Name Printed or Typed
111 Westside Steet, Someplace, WI 51111
Address
LSmith@email.com
Email Address
(715) 888-9999
Telephone Number Date

Signature of Surety
Name Printed or Typed
Address
Email Address
Telephone Number Date

Table with 2 columns: Name, Address, Email Address, Telephone Number, Bar Number (If any)

STATE OF WISCONSIN, CIRCUIT COURT, (DECEDENT'S COUNTY) COUNTY

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT

Name

**Court Approval of Signature Bond
In Estate or Trust Proceedings**

For the following trust:

Trust under the Will of William Elliott f/b/o John Miller

Case No. 2022PR000011

June 1, 2009

A Signature Bond In Estate or Trust Proceedings was filed on [Date] _____.

Satisfactory evidence as to financial responsibility of surety has been reviewed by the designated court officer.

Date Bond Approved: _____.

DISTRIBUTION:

- 1. Court
- 2. Personal Representative/Attorney

Consent to Serve as Trustee

Form No.: [PR-1930](#)

Purpose of Form: To consent to serve as trustee and designate resident agent for nonresident trustee.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- If you live outside the State of Wisconsin, check the box in No. 3 and fill in the name of the Wisconsin resident you wish to appoint to accept service of process on your behalf if that becomes necessary. This person is then known as the "Resident Agent."
- If you have to appoint a Wisconsin resident as your "Resident Agent," then that person must sign the bottom of this form, including his or her address and the date of signing



Check with the Office of Register in Probate to see if you must sign this form prior to meeting with the Registrar or if you must wait until you meet with the Registrar to open the estate.

In the lower left-hand corner of the form, fill in the "Form completed by" box.

**STATE OF WISCONSIN, CIRCUIT COURT, (DECEDENT'S COUNTY)
COUNTY**

SAMPLE

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOTT

Name

Consent to Serve as Trustee

Informal Administration

Formal Administration

For the following trust:

Trust under the Will of W. Elliott fbo John Miller

Case No. 2022PR000011

1. I consent to serve as trustee and agree to carry out the terms of the trust according to the will. I submit personally to the jurisdiction of the court in any proceeding relating to the trust that may be instituted by any interested person and agree to be bound by the laws of Wisconsin.
2. I will file any required bond.
3. I am a nonresident of Wisconsin and have applied for letters in this trust.

I appoint [Name] _____ as resident agent to accept service of process.

▶ _____
Trustee
Mary Smith
Name Printed or Typed
555 Blank Street, Somplace, WI 51111
Address
M.Smith. Address@email.com (715) 999-9999
Email Address Telephone Number
Date N/A
State Bar No. (if any)

Acceptance by Resident Agent

I accept this appointment as resident agent.

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Email Address M.Smith. Address@email.com	
Telephone Number (715) 999-9999	Bar Number (If any) N/A

▶ _____
Resident Agent

Name Printed or Typed

Address

Email Address Telephone Number
Date State Bar No. (if any)

Letters of Trust (Issued under Informal Administration)

Form No.: [PR-1931](#)

Purpose of Form: Written authority of a Trustee as outlined in a Will to act on behalf of a testamentary trust in an estate.

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Leave the case number blank, as the Probate Registrar will assign the case number, unless a number has already been assigned.

- Fill in the section after "To:" with the name and address of the Trustee.
- Insert the decedent's date of birth, date of death, county and state.
- In the lower left-hand corner of the form fill in the name, address and telephone number of the Trustee.

Certified copies of the Trust Letters are available for a fee from the Office of Register in Probate.

NOTE: Pursuant to state statute, Letters of Trust must be issued at the same time that Domiciliary Letters are issued.

STATE OF WISCONSIN, CIRCUIT COURT, (DECEDENT'S COUNTY)

COUNTY

IN THE MATTER OF THE ESTATE OF

Amended

William Elliott
Name

For the following trust:

Trust under the Will of William Elliott f/b/o John Miller

Letters of Trust
 Informal Administration
 Formal Administration

Case No. 2022PR000011

To: Mary Smith
555 Blank Street
Someplace, WI 51111

The decedent, with date of birth December 30, 1940 and date of death January 10, 2022, was domiciled in (decedent's county) _____ County, State of Wisconsin.

The decedent's will was admitted to probate. You are granted Letters of Trust with the general powers and duties of trustee(s). You are authorized to administer the trust as required by law.

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Telephone Number (715) 999-9999	Bar Number (If any) N/A

(COURT SEAL)

Demand for Formal Proceedings (Informal Administration)

Form No.: [PR-1813](#)

Purpose of Form: To initiate formal proceedings as to a particular issue or the entire subsequent administration of informal estate proceedings. Sometimes during the administration of an “informal estate” it becomes necessary for a judge to make a determination about a specific issue. This form is used to transfer from informal proceedings to formal proceedings so that a judge can hear the matter.

Directions:

Type or print the name of decedent’s county at the top of the Application and insert the name of the decedent below the words “In the Matter of the Estate of...” The second line can be used for any alternative names with the designation “a/k/a” for also known as. Check the box for “Informal Administration.” Fill in the case number.

- Check the appropriate box to indicate whether you are the personal representative for the estate/interested person/representative of interested person/court official.
- Check the appropriate box to indicate whether you are asking the court to determine a particular issue or if you wish for the court to supervise all the remaining proceedings for this estate.

If you are requesting the court to determine a particular issue, provide a complete explanation of your demand and specify the action you are requesting of the court. You may attach additional information to the form, if necessary for a complete explanation.

Sign and date the form at the bottom.

Fill in the “Form completed by” box.

A copy of this Demand must be provided to the Personal Representative who in turn provides a copy to all the interested persons.

Read the Demand carefully regarding suspension of powers of the Personal Representative.

IN THE MATTER OF THE ESTATE OF

Amended

WILLIAM ELLIOT

**Demand for Formal Proceedings
(Informal Administration)**

Name

January 10, 2022

Date of Death

Case No. 2022PR000011

1 I am the personal representative in this estate.

- an interested person in this estate.
- representatives of interested person.
- a court official.

2 This matter is pending under informal administration and I demand formal proceedings for

the remaining administration of the estate.

limited issue(s): [Explain] I am objecting to the claim of XYZ, Collections, Inc. and it will be necessary for me to present my objection to the Court for a hearing and a decision.



Signature

Mary Smith

Name Printed or Typed

555 Blank Street, Someplace, WI 51111

Address

M.Smith.Address@email.com

Email Address

(715) 999-9999

Telephone Number

Date

State Bar No. (if any)

The signer of this document is required to serve a copy of this document on the personal representative.

If there is a personal representative, service of this document suspends:

- the powers of the personal representative
- the informal administration of this estate

until reinstated by the court.

Form completed by: [Name] <u>Mary Smith</u>	
Address <u>555 Blank Street Someplace, WI 51111</u>	
Email Address <u>M.Smith.Address@email.com</u>	
Telephone Number <u>(715) 999-9999</u>	Bar Number (If any) <u>N/A</u>

Notice of Distribution to Ward

Form No.: [PR-1822](#)

Purpose of Form: To notify the court appointing a guardian of the estate of property to be distributed to the guardian of the estate for the benefit of the guardian's ward. If an incompetent or minor is an heir/beneficiary of the estate, distributions may have to be made to that person's guardian of estate. Consult with the Probate Registrar to determine if this is necessary. If so, you must complete this form and send it to the court appointing the guardian of estate **at least ten (10) days prior to the distribution.**

Directions:

Type or print the name of decedent's county at the top of the Application and insert the name of the decedent below the words "In the Matter of the Estate of..." The second line can be used for any alternative names with the designation "a/k/a" for also known as. Check the box for "Informal Administration." Fill in the case number.

- Insert the name of the court which appointed the guardian of estate.
- Insert the name of the guardian of estate.
- Describe the property distributed (cash payment, items of personal property, interest in real estate, etc.).
- Sign and date.

Fill in the "Form completed by" box.



Copies of Notice of Distribution to Ward must be filed in both the guardianship and probate court file.

IN THE MATTER OF ESTATE OF

Amended

William Elliott
Name

**Notice of
Distribution to Ward**

deceased

**Informal
Administration**
 Formal Administration

Case No. 2022PR000011

To: [Name of Court] Circuit Court for Blue County, Wisconsin the court that appointed the guardian of estate for
[Name of Ward] Jane Jones.

PLEASE TAKE NOTICE:

As personal representative, I will distribute from this estate proceeding to [Name of guardian of estate] Jacob Jones,
guardian of estate for [Name of Ward] Jane Jones the following property: **See attached**

Description of Property	Value
Cash	\$38,709.83

I am providing this notice to you **at least ten (10) days** prior to the distribution.

Form completed by: (Name) Mary Smith	
Address 555 Blank Street Someplace, WI 51111	
Email Address M.Smith.Address@email.com	
Telephone Number (715) 999-9999	Bar Number (If any) N/A

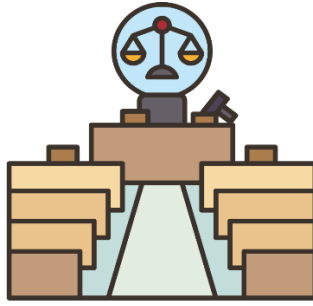
▶ _____
Personal Representative

Mary Smith
Name Printed or Typed

555 Blank Street, Someplace, WI 51111
Address

M.Smith.Address@email.com (715) 999-9999
Email Address Telephone Number

Date State Bar No. (if any)



Links for Other Potentially Required Actions

Employer Identification Number (EIN) is a free service offered by the Internal Revenue Service.

Form: SS-4 Application for Employer Identification Number

Purpose of Form: Use Form SS-4 to apply for an employer identification number (EIN). An EIN is a 9-digit number (for example, 12-3456789) assigned to employers, sole proprietors, corporations, partnerships, estates, trusts, certain individuals, and other entities for tax filing and reporting purposes.

Downloadable forms with instructions (printable and fillable) are available on the web at:
<https://www.irs.gov/pub/irs-pdf/fss4.pdf>

For more information go to:

<https://www.irs.gov/businesses/small-businesses-self-employed/how-to-apply-for-an-ein>

Probate Claims Notice (F- 13033)

Purpose of Form: To provide written notice to the Department of Health Services and County Clerk of the decedent's date of death and whether the decedent or decedent's spouse received medical assistance.

Downloadable forms with instructions (printable and fillable) are available on the web at:
<https://www.dhs.wisconsin.gov/forms/f1/f13033.pdf>

Fiduciary Schedule CC – Request for a Closing Certificate for Fiduciaries

Form: Wisconsin Department of Revenue Schedule CC

Purpose of the Form: To request a Closing Certificate from the Wisconsin Department of Revenue.

Downloadable forms with instructions (printable and fillable) are available on the web at:
<https://www.revenue.wi.gov/TaxForms2020/2020-ScheduleCCf.pdf>

For more information go to <https://www.revenue.wi.gov/Pages/FAQS/ise-estate.aspx>

Request for Discharge from Personal Liability Internal Revenue Code Section 2204 or 6905

Form: IRS Form 5495 (Rev. 12/2008)

Purpose of the Form: To request from the Internal Revenue Service a discharge, as an "executor" of a decedent's estate, from personal liability for a decedent's income, gift and estate tax deficiencies.

For more information go to <https://www.irs.gov/pub/irs-pdf/f5495.pdf>