

FORMAL ADMINISTRATION CHECKLIST

THE ESTATE OF _____
CASE No.: PR

An Attorney Licensed to practice in Wisconsin is required This checklist is NOT meant to provide legal advice; it is merely a guide that may help you through the estate administration process.

REQUIRED FORMS: TO BEGIN:

(Complete)

- _____ WILL –if not already filed with the court
- _____ CODICIL –if applicable and not already filed with the court
- _____ PR-1901 Application for Formal Administration (signature notarized)
- _____ PR-1806 Proof of Heirship (signature notarized)
- _____ PR-1902 Waiver and Consent (To be signed by ALL beneficiaries named in the will and ALL heirs)
- _____ PR-1807 Consent to Serve (signed by Executor/Personal Representative)
- _____ **(Complete-Court will sign)**
- _____ PR-1904 Order Setting Deadline to File Claim (Published Notice gives 90–120 days to file claim)
- _____ PR-1905 Order for Formal Administration
- _____ PR-1810 Domiciliary Letters -Certified copies can be used to transfer assets.

OPTIONAL FORMS MAY BE NEEDED:

- _____ PR-1903 Order Setting Time to Hear Petition for Administration & Deadline for Filing Claims
- _____ PR-1817 Affidavit of Service (if not filed on Waivers)
- _____ PR-1821 Order Dispensing with Guardian Ad Litem

FORMS TO CLOSE ESTATE:

- _____ **Proof of Publication** From Newspaper (Newspaper will send Affidavit of Publication to Executor with invoice – original to be filed with Probate Court)
- _____ PR-1909 Judgment on Claims
- _____ PR-1814 Estate Account with Schedules (signature notarized)
- _____ Filing Fee Payable to “Clerk of Courts” (.2% of the WI assets or minimum of \$20.00 as required by Sec. 814.66, Wis. Stats)
- _____ PR-1910 Petition for Final Judgment
- _____ PR-1911 Order and Notice for Final Judgment (Formal Administration)
- _____ PR-1817 Affidavit of Service for Final Account
- _____ PR-1912 Final Judgment
- _____ PR-1915 Order Discharging Personal Representative (Complete-Court will sign)
- _____ Closing Certificate for Fiduciaries (Specifically request from Wis. Dept. of Revenue when you file the decedent’s final income tax return)

ADDITIONAL FORMS MAY BE NEEDED:

- _____ PR-1915 Estate Receipts (from Creditors when claim is paid; heirs for each distribution (partial or full))
- _____ PR-1913 Abridgment of Final Judgment
- _____ PR-1914 Proof of Recording
- _____ PR-1926 Petition for Termination of Joint Tenancy Termination/Life Estate
- _____ PR-1927 Certificate of Termination of Joint Tenancy Termination/Life Estate

MEDICAL ASSISTANCE (TITLE 19, MA, MEDICAID): §867.02, Wis. Stats. Requires that you notify the Department of Health and Family Services if the deceased or the deceased's spouse received Medical Assistance or any of the other service or benefits that are listed on the Petition. Mail the **Probate Claims Notice** or a copy of the Petition and Notice to Creditors by certified mail, return receipt requested, to: Department of Health and Family Services, Estate Recovery Program, P.O. Box 309, Madison, WI 53701-0309. <https://www.dhs.wisconsin.gov/forms/f1/f13033.pdf>

A bond may be required before Letters are issued. This would be decided by the Court based on the value of the estate, the type of assets and the terms on the will.

CERTIFIED COPIES: If certified copies are required, the cost is \$3.00 for the certification plus \$1.00 per page to be certified. (A certified copy of a one-page document is \$4.00; a certified copy of a two-page document is \$5.00, etc.)

Please call 266-4331 for an appointment for all future conferences

PR Numbered Forms available on internet at: <http://www.wicourts.gov/forms1/circuit.htm>
Add'l Info @ Probate Office website: <https://courts.countyofdane.com/Prepare/Probate>
Check the case file on internet: <http://wcca.wicourts.gov>
SS-4 Application for Employer Identification Number-from IRS (www.irs.gov)