

FORMAL ADMINISTRATION CHECKLIST

ESTATE: _____

CASE No.: PR

REQUIRED FORMS: TO BEGIN:

(Complete)

- _____ WILL –if 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 proposed Executor/Personal Representative)

(Complete-Court will sign)

- _____ PR-1904 Order Setting Deadline to File a Claim (Published Notice will give 90 - 120 days to file claims)
- _____ PR-1905 Order for Formal Administration
- _____ PR-1810 Domiciliary Letters - Certified copies can be used to transfer assets.

OPTIONAL FORMS MAY BE NEEDED:

- _____ GF-131 Appointment of Guardian Ad Litem or Attorney for Person in Military Service
- _____ PR-1903 Order Setting Time to Hear Petition for Administration and Deadline for Filing Claims
- _____ PR-1817 Affidavit of Mailing
- _____ 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 – to be filed with Probate Court)
- _____ PR-1811 Inventory (to be filed within six (6) months of filing date - signature notarized)
- _____ Filing Fee Payable to “Clerk of Courts” .2% of net value of Inventory or \$2.00 per thousand of assets (ie: House=\$150,000 Less Mortgage \$100,000 = Net \$50,000 times \$2/K=\$100 Filing Fee)
- _____ PR-1814 Estate Account (final accounting - signature notarized)
- _____ PR-1815 Estate Receipt (from each beneficiary for their distribution)
- _____ Proof of Real Estate Transfer - copy of deed if real estate transferred to a beneficiary
- _____ PR-1915 Order Discharging Personal Representative
- _____ **Closing Certificate for Fiduciaries** (Specifically request from Wis. Dept. of Revenue when you file the decedent’s final income tax return).

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

PR Numbered Forms available on internet at: <http://www.wicourts.gov/forms/circuit.htm>
 Deadlines/Add'l Info @ Probate Office website: <http://courts.countyofdane.com/Prepare/Probate>
 Check the case file on internet: <http://wcca.wicourts.gov>

SS-4 Application for Employer Identification Number (EIN)-from IRS (www.irs.gov)