

INFORMAL ADMINISTRATION CHECKLIST

ESTATE: _____

CASE No.: _____ **PR**

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
- _____ PR-1801 Application for Informal Administration (signature notarized)
- _____ PR-1806 Proof of Heirship (signature notarized)
- _____ PR-1803 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-1804 Notice to Creditors (Published Notice will give 90 days to file claims)
- _____ PR-1808 Statement of Informal 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-1805 Notice to Interested Persons and Time Limits 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 – original 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 the Wisconsin assets or a minimum of \$20.00 as required by Sec. 814.66, Wis. Stats).
- _____ PR-1814 Estate Account (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-1816 Personal Representative’s Statement to Close Estate (signature notarized)
- _____ **Closing Certificate for Fiduciaries** (Specifically request from Wis. Dept of Revenue when you file the decedent’s final income tax return.)

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/fl/fl3033.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)
- Online guide to informal probate at: <http://www.wripa.org>

Special Notice regarding Obtaining an Employer ID number.

The IRS does not charge any fee for issuing an Employer ID number. If you are asked to pay, you are using a third party vendor.