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## INFORMAL PROBATE

PIERCE COUNTY  
PROBATE OFFICE  
414 W. MAIN STREET  
ELLSWORTH, WI 54001

HOURS:  
MONDAY-FRIDAY  
8:00 AM-5:00 PM

PHONE: 715-273-6752

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**NOTE:** This guideline is provided only as a public service and is not meant to be legal advice. The Register in Probate office cannot give legal advice; please contact an attorney if you have legal questions.

### **TO OPEN AN INFORMAL PROBATE:**

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

PR-1801	<b>Application for Informal Administration</b>
PR-1806	<b>Proof of Heirship</b>
PR-1803	<b>Waiver and Consent</b>
PR-1804	<b>Notice to Creditor (OR, if waivers are not filed, complete PR-1805)</b>
PR-1805	<b>Notice setting Time to Hear Application and Deadline for Filing Claims*</b>
PR-1807	<b>Consent to Serve</b>
PR-1808	<b>Statement of Informal Administration</b>
PR-1810	<b>Domiciliary Letters</b>
Original	Will and any Codicils (copy to be provided to all interested persons)
Original	Probate Claims Notice; copy to WI Dept. of Family Services and County Clerk
Original	Trusts- See page 2.

\*Personal Representative (PR) will be appointed after the hearing date listed on the Notice Setting Time to Hear Application and once the following documents are filed: Affidavit of Publication from the newspaper and form **PR-1817** Affidavit of Service showing proof that the notice was mailed to the interested persons.

**AFTER PR APPOINTMENT:** Complete and file the originals of the following:

### **SECOND STEP: INVENTORY**

PR-1811	Inventory <b>DUE</b> no later than 6 months after Domiciliary Letters are issued
Filing Fee	Statutory inventory filing fee of <b>0.2%</b> of the assets is due with the inventory
PR-1817	Affidavit of Service- Inventory to interested persons

### **THIRD STEP: FINAL ACCOUNT**

PR-1814	Estate Account w/ attached schedules
PR-1817	Affidavit of Service- Estate Account to Interested persons
Note	Additional property listed is subject to the <b>0.2%</b> Filing fee

### **FOURTH STEP: CLOSING DOCUMENTS**

PR-1815	Estate Receipts from heirs/beneficiaries for partial and/or full distributions
PR-1815	Estate Receipts from claimants, if claims were filed
PR-1816	Personal Representative's Statement to Close Estate



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### OTHER DOCUMENTS:

Original	Affidavit or Proof of Publication from newspaper
Original	Closing Certification for Fiduciary from WI Dept. of Revenue (see below)

**BOND:** May be required prior to appointment of the PR; determination will be made whether bond will be a signature bond (form PR-1809) or corporate bond.

**TRUSTS:** If the decedent's Will establishes a trust, please complete the following forms: PR-1930 Consent to Serve as Trustee and PR-1931 Letters of trust and file the originals with the Register in Probate office when the estate is opened.

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

**CLOSE ESTATE:** Estates shall be closed 12 months after the Application is filed as set by the Wisconsin Chief Judges.

**CERTIFIED COPIES:** If requested, are \$3.00 for the certification and \$1.00 for each page copied and compared. If requested through the mail, please enclose a self-addressed, stamped envelope together with the correct fee.

**ADDITIONAL RESOURCES:** A booklet called "A Personal Representatives Guide to Informal Probate in Wisconsin" is available at your local probate office for a fee or online at [www.wripa.org](http://www.wripa.org)

**WISCONSIN TAX FORMS:** <http://www.dor.state.wi.us/html/formpub.html>

A Closing Certificate for Fiduciaries is required before closing the estate. Request the Closing Certificate by completing Schedule CC and any other necessary fiduciary tax returns. Submit schedule CC and any fiduciary returns together with all requested documents to: Wisconsin Department of Revenue, P.O. Box 8918, Madison, WI 53708-8918. Filing of the fiduciary, estate tax and income tax returns in the personal representative's responsibility.

**IRS NOTICE:** The Internal Revenue Service may be a creditor of the decedent and should be promptly notified of the death and any probate proceeding. Form 56- Notice of Concerning Fiduciary Responsibility is included with this guideline or can be found at [www.irs.gov](http://www.irs.gov).