

PIERCE COUNTY  
Register in Probate Office

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**Guidelines for Request for Closing Certificate for Fiduciaries – Schedule CC**

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.

**Schedule CC will be scanned at the Department of Revenue, therefore, it should be typed or filled out with black ink**

**FOR ESTATES:**

1. Complete all of the information requested in the header box, except second line. Fill in appropriate information in all boxes.
2. Complete Part I of the front of Schedule CC, numbers 1-10.
3. Submit a copy of the probate Inventory, and the Will and Codicils, if any.
4. Personal Representative (Fiduciary) must sign and date the back of Schedule CC in the appropriate box at the bottom of the page.

**FOR TRUSTS:**

1. Complete all of the information requested in the header box, except first line. Fill in the appropriate information in all boxes.
2. Complete Part II of the back of Schedule CC, numbers 1-9.
3. Submit the last three years of Trusts annual accountings and a copy of the trust instrument (Will).
4. Trustee (Fiduciary) must sign and date at the bottom of Schedule CC in the appropriate box at the bottom of the page.

NOTE- Do not use staples or paper clips to assemble the Schedule CC and other documents.

Mail completed Schedule CC and required documents to:  
Wisconsin Department of Revenue  
P.O. Box 8918  
Madison, WI 53708-8918

**The closing Certificate for Fiduciaries will be sent to the address shown in the header box on the front page of Schedule CC. Make sure the mailing address you insert is correct.**

**FORM:** Schedule CC can be found at: <http://www.dor.state.wi.us/forms/2007/07i-030.pdf>

For help with form you may:

Call (608)266-2772- Menu Option 4  
Email: [estate@revenue.wi.gov](mailto:estate@revenue.wi.gov)  
Write: Department of Revenue, MS 5-144, P.O. Box 8906, Madison, WI 53708  
Consult your tax preparer or accountant

**This form does not get filed with the Probate Office. You must file Schedule CC and other documents with the Department of Revenue and request the Closing Certificate for Fiduciaries be sent to you. Once you receive the Closing Certificate for Fiduciaries from the Department of Revenue, you must file the original of that Certificate with the Probate Court.**