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## SUMMARY ASSIGNMENT

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 A SUMMARY ASSIGNMENT:** Complete and file the following:

PR-1840	<b>Petition for Summary Assignment</b> (inventory filing fee due; see below)
PR-1806	<b>Proof of Heirship</b>
PR-1846	<b>Waiver and Consent</b>
PR-1842	<b>Notice to Creditor for Summary Assignment -OR-</b>
PR-1843	<b>Order &amp; Notice of Hearing Petition of Summary Assignment</b> (if required, see below**)
Original	Will and any Codicils
Original	Probate Claims Notice- included with these guidelines, may also be found at <a href="http://www.dhs.wisconsin.gov/forms/f1/f133033.pdf">http://www.dhs.wisconsin.gov/forms/f1/f133033.pdf</a>

\*\*PR-1843 required if Waiver and Consents are not or cannot be obtained from all interested persons.

**FEE:** A statutory inventory filing fee is due when the petition is filed. The fee is .2% of the assets or a minimum of \$20.00 if the assets are under \$10,000.00. See sec. 814-66, Wis. Stats.

**SPECIAL ADMINISTRATOR:** Special Administration letters can be requested, if necessary, at the same time the estate is opened. See below.

**AFTER ESTATE IS OPENED AND INVENTORY FILING FEE IS PAID:**

1. Deliver Notice to Creditors or Order & Notice of Hearing Petition to newspaper for publication.
2. Mail the Order & Notice of Hearing Petition (if this form was filed) to all interested persons.
3. Mail a copy of Probate Claims Notice to the County Clerk and by certified mail to the Department of Health Services Estate Recovery Program Section.

**AFTER NOTICE IS PUBLISHED, FILE THE FOLLOWING:**

PR-1841	Affidavit of Additional Property and/or Creditor for Summary Assignment- if additional assets are found and/or not listed on the Petition; additional filing fee is also due of .2%. Also use if additional creditors are discovered.
PR-1817	Affidavit of Service- of the Order and Notice of Hearing to all interested persons
Original	Affidavit or Proof of Publication from Newspaper
Proof	Certified mail receipt card showing Probate Claims Notice was mailed
PR-1844	Order on Petition for Summary Assignment
PR-1817	Affidavit of Service- of the Order on Petition for Summary Assignment

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### **AFTER CLAIMS DATE; TO CLOSE ESTATE:**

PR-1815	<b>Estate Receipt from all heirs/beneficiaries for full distribution</b>
PR-1815	<b>Estate Receipt from claimants; if claims were filed</b>
PR-1854	<b>Petition for Discharge of Special Administrator</b>
PR-1855	<b>Order Discharging Special Administrator (if Special administrator was appointed)</b>

**TO BE APPOINTED SPECIAL ADMINISTRATOR:** Complete the following forms and file with the Petition for Summary Assignment:

PR-1807	<b>Consent to Serve</b>
PR-1852	<b>Order for Special Administration</b>
PR-1853	<b>Letters of Special Administration</b>

- A Bond may be required by the Court before letters can be issued.
- Certified copies of the Letters of Special Administration can be obtained from the Register in Probate office. If requested, the statutory fees are \$3.00 for each certification and \$1.00 for each page copied and compared. If requested through the mail, please enclose a self-addressed, stamped envelop together with the correct fee.

**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. The IRS Notice is included with the guideline.

**FORMS:** Additional/duplicate forms can be found at <http://www.wicourts.gov>