
INFORMAL PROBATE

POLK COUNTY
PROBATE OFFICE
1005 W. MAIN STREET, SUITE 500
BALSAM LAKE, WI 54810

HOURS:
MONDAY – FRIDAY
8:30 AM – 4:30 PM

PHONE: 715-485-9238

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	Application for Informal Administration
PR – 1806	Proof of Heirship
PR – 1803	Waiver and Consent
PR – 1804	Notice to Creditors (OR, if waivers are not filed, complete PR-1805)
PR – 1805	Notice to Interested Persons and Time Limit for Filing Claims *
PR – 1807	Consent to Serve
PR – 1808	Statement of Informal Administration
PR – 1810	Domiciliary Letters
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
Other	Trusts – see page 2.

*Personal Representative (PR) will be appointed after the hearing date listed on the Notice to Interested Persons once the following documents are filed: Affidavit of Publication from the newspaper and form PR – 1817 Affidavit of Mailing 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 DUE no later than 4 months after Domiciliary Letters are issued
Filing Fee	Statutory inventory filing fee of 0.2% of the assets is due with the inventory
PR – 1817	Affidavit of Mailing – inventory to interested persons

THIRD STEP: FINAL ACCOUNT

PR – 1814	Final Account w/ attached schedules
PR – 1817	Affidavit of Mailing – final account to interested persons
Note	additional property listed is subject to the 0.2% filing fee

FOURTH STEP: CLOSING DOCUMENTS

PR – 1815	Estate Receipt from heirs/beneficiaries for partial and/or full distributions
PR – 1815	Estate Receipt 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 Certificate 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 a 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-1829 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: Estate shall be closed 12 months after the Application is filed pursuant to 10th Judicial District benchmarks.

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 Representative's Guide to Informal Probate in Wisconsin" is available at your local probate office for a fee or online at www.wripa.org

FORMS: additional/duplicate forms can be found at: www.wicourts.gov

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, PO Box 8918, Madison WI 53708-8918. Filing of the fiduciary, estate tax, and income tax returns is 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 Concerning Fiduciary Responsibility is included with this guideline or can be found at www.irs.gov.