

## INFORMAL ADMINISTRATION CHECKLIST

ESTATE: \_\_\_\_\_

DODGE 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 and Codicils if any –if not already filed with the court
- \_\_\_\_\_ **PR-1801** Application for Informal Administration
- \_\_\_\_\_ **PR-1806** Proof of Heirship
- \_\_\_\_\_ **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-131A** Order Appointing Guardian Ad Litem or Attorney
- \_\_\_\_\_ **GF-131B** Consent to Act as Guardian Ad Litem or Attorney
- \_\_\_\_\_ **PR-1802** Declination to Serve or Resignation
- \_\_\_\_\_ **PR-1805** Notice to Interested Persons and Time Limits for Filing Claims (in lieu of PR-1804)
- \_\_\_\_\_ **PR-1817** Affidavit of Mailing
- \_\_\_\_\_ **PR-1821** Order Dispensing with Guardian Ad Litem
- \_\_\_\_\_ **PR-1833** Petition for Extension of Time
- \_\_\_\_\_ **PR-1834** Order for Extension of Time

### **FORMS TO CLOSE ESTATE:**

- \_\_\_\_\_ **Proof of Publication** (Newspaper will send to PR with invoice – original to be filed with Probate Court)
- \_\_\_\_\_ **PR-1811** Inventory (to be filed within six (6) months of filing date)
- \_\_\_\_\_ **Filing Fee** Payable to “Clerk of Courts” (.2% of the assets or a minimum of \$20.00 as required by Sec. 814.66, Wis. Stats).
- \_\_\_\_\_ **PR-1814** Estate Account
- \_\_\_\_\_ **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
- \_\_\_\_\_ **Closing Certificate for Fiduciaries** (Specifically request from Wis. Dept of Revenue.)

**MEDICAL ASSISTANCE (TITLE 19, MA, MEDICAID):** §§859.07(2), 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/f13033.pdf>

A **surety 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, the amount of debts 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 (920) 386-3550 for an appointment for all future conferences**

- PR Numbered Forms available on internet at: <http://www.wicourts.gov/forms1/circuit.htm>
- Check the case file on internet: <http://wcca.wicourts.gov>
- SS-4 Application for Employer Identification Number-from IRS ([www.irs.gov](http://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. They are taking your information, making the application and getting the number for you.

To apply on your own, use IRS.gov. Click on the box to apply for a number. If you want to do so now, this will take you directly to the application form. [Apply Now.](#)