

ANCILLARY ADMINISTRATION CHECKLIST

Dodge Case No.: PR

An Attorney Licensed to practice in Wisconsin is required. This checklist is NOT meant to provide legal advice; it is merely a guide that may help you through the estate administration process.

It is the responsibility of the petitioning party to submit current forms to the probate court. Wis. Stat. §807.001(1). Attorneys shall use either uniform forms or computer-generated forms, if the forms exactly recreate the original forms in wording, format, and substance. If these forms are not used, the court may refuse the filing. Wis. Stat. §879.47. Alterations to the forms are not permitted.

Electronic filing is now mandatory for attorneys in Dodge County cases, under Wis. Stat. §801.18.

REQUIRED FORMS TO BEGIN ANCILLARY ADMINISTRATION:

(Complete)

- Authenticated WILL –must be filed with the Application
- Authenticated Letters from foreign jurisdiction (**NOTE: Authentication date must be within 30 days of filing**).
- [PR-1960](#) Application for Ancillary Administration
- [PR-1966A](#) Consent to Serve
- [PR-1961](#) Proposed Order for Ancillary Administration
- [PR-1962](#) Proposed Ancillary Letters

OPTIONAL FORMS MAY BE NEEDED:

- [PR-1966B](#) Consent to Serve by Resident Agent (**When Ancillary Representative is NOT a WI resident, Register in Probate is to be resident agent per Wis. Stat. §868.03(5)**) for all interested parties.
- [PR-1817](#) Affidavit of Service (of copy of Application to Foreign Jurisdiction Personal Representative if they are not the Ancillary Representative)

NOTE: Surety Bond, as determined by the Court, is required if Ancillary Representative is not a Wisconsin Resident (Wis. Stat. §868.03(4).)

FORMS TO CLOSE ANCILLARY ADMINISTRATION:

- [PR-1963](#) Petition for Transfer of Residue
- Filing Fee** Payable to “Clerk of Courts” (.2% of the assets or a minimum of \$20.00 as required by 814.66, Wis. Stats)
- [PR-1964](#) Proposed Order for Transfer of Residue
- [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-1965](#) Proposed Order Discharging Ancillary Representative (Complete-Court will sign)

MEDICAL ASSISTANCE (TITLE 19, MA, MEDICAID): §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>

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>
Wisconsin Register in Probate website: <http://www.wripa.org>
SS-4 Application for Employer Identification Number-from IRS (www.irs.gov)

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.](#)