

SUMMARY SETTLEMENT CHECKLIST

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 –if not already filed with the court
- CODICIL –if applicable and not already filed with the court
- PR-1835 Petition for Summary Settlement (signature notarized) Pay filing fee due, Payable to “Clerk of Courts” (.2% of the assets or a minimum of \$20.00 as required by §814.66, Wis. Stats)
- PR-1806 Proof of Heirship (signature notarized)
- PR-1836 Order and Notice for Hearing on Petition for Summary Settlement
- PR-1846 Waiver and Consent (To be signed by ALL beneficiaries named in the will and ALL heirs)
- PR-1817 Affidavit of Service (if not filed on Waivers)

TO CLOSE SUMMARY SETTLEMENT:

(Complete-Court will sign)

- PR-1837 Order on Petition for Summary Settlement

IF ALSO REQUESTING SPECIAL ADMINISTRATION:

(Complete)

- PR-1807 Consent to Serve (signed by proposed Executor/Personal Representative)

(Complete-Court will sign)

- PR-1852 Order for Special Administration
- PR-1853 Letters of Special Administration

TO CLOSE SPECIAL ADMINISTRATION:

- PR-1854 Petition for Discharge of Special Administrator (signature notarized)
- PR-1855 Order Discharging Special Administrator (Complete-Court will sign)
- PR-1815 Estate Receipt(s) (From each beneficiary for their distribution)

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/fl3033.pdf>

A **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 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 266-4331 for an appointment for all future conferences

PR Numbered Forms available on internet at: <http://www.wicourts.gov/forms1/circuit.htm>
Add'l Info @ Probate Office website: <https://courts.countyofdane.com/Prepare/Probate>
Check the case file on internet: <http://wcca.wicourts.gov>
Wisconsin Register in Probate website: <http://www.wriipa.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.