

## FORMAL ADMINISTRATION CHECKLIST

THE ESTATE OF \_\_\_\_\_  
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.*

### **REQUIRED FORMS: TO BEGIN:**

- \_\_\_\_\_ WILL –if not already filed with the court
- \_\_\_\_\_ CODICIL –if applicable and not already filed with the court
- \_\_\_\_\_ [PR-1901](#) Application for Formal Administration
- \_\_\_\_\_ [PR-1806](#) Proof of Heirship
- \_\_\_\_\_ [PR-1902](#) Waiver and Consent (To be signed by ALL beneficiaries named in the will and ALL heirs)
- \_\_\_\_\_ [PR-1807](#) Consent to Serve (signed by Executor/Personal Representative)  
(Complete-Court will sign)
- \_\_\_\_\_ [PR-1904](#) Order Setting Deadline to File Claim (Notice gives 90–120 days to file claim)
- \_\_\_\_\_ [PR-1905](#) Order for Formal 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 for Person in Military Service
- \_\_\_\_\_ [GF-131B](#) Consent to Act as Guardian Ad Litem or Attorney for Person in Military Service
- \_\_\_\_\_ [PR-1802](#) Declination to Serve or Resignation
- \_\_\_\_\_ [PR-1817](#) Affidavit of Service (if not filed on Waivers)
- \_\_\_\_\_ [PR-1821](#) Order Dispensing with Guardian Ad Litem
- \_\_\_\_\_ [PR-1903](#) Order Setting Time to Hear Petition for Administration & Deadline for Filing Claims

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

- \_\_\_\_\_ **Proof of Publication** From Newspaper (Newspaper will send Affidavit of Publication to Executor with invoice – original to be filed with Probate Court)
- \_\_\_\_\_ [PR-1811](#) Inventory (must include filing fee below)
- \_\_\_\_\_ Filing Fee Payable to “Clerk of Courts” (.2% of the WI assets or minimum of \$20.00 as required by §814.66, Wis. Stats)
- \_\_\_\_\_ [PR-1814](#) Estate Account with Schedules
- \_\_\_\_\_ [PR-1815](#) Estate Receipts (heirs for each distribution (partial or full))
- \_\_\_\_\_ [PR-1909](#) Judgment on Claims
- \_\_\_\_\_ [PR-1910](#) Petition for Final Judgment
- \_\_\_\_\_ [PR-1911](#) Order and Notice for Final Judgment (Formal Administration)
- \_\_\_\_\_ [PR-1817](#) Affidavit of Service for Final Account
- \_\_\_\_\_ [PR-1912](#) Final Judgment
- \_\_\_\_\_ [PR-1915](#) Order Discharging Personal Representative (Complete-Court will sign)
- \_\_\_\_\_ Closing Certificate for Fiduciaries (Specifically request from Wis. Dept. of Revenue when you file the decedent’s final income tax return)

**ADDITIONAL FORMS MAY BE NEEDED:**

- \_\_\_\_\_ [PR-1815](#) Estate Receipts (from Creditors when claim is paid)
- \_\_\_\_\_ [PR-1913](#) Abridgment of Final Judgment
- \_\_\_\_\_ [PR-1914](#) Proof of Recording
- \_\_\_\_\_ [PR-1926](#) Petition for Termination of Joint Tenancy Termination/Life Estate
- \_\_\_\_\_ [PR-1927](#) Certificate of Termination of Joint Tenancy Termination/Life Estate
- \_\_\_\_\_ [PR-1833](#) Petition for Extension of Time
- \_\_\_\_\_ [PR-1834](#) Order for Extension of Time

**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/f1/f13033.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 (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))

**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.](#)