

## TRUST TERMINATION CHECKLIST/PETITION FOR TRUSTEES

1. **Petition for Termination of Trust** - Must explain conditions in the will that require termination now and how these have been met.
2. **Final Account** - Through date of Petition or zero balance of all funds have been used or distributed. Use Annual Account form and indicate that this is the Final Account.
3. **Waiver and Consent** - From all interested persons who share in the trust distribution.
4. **Closing Certificate for Fiduciaries** -- Wisconsin Income Tax Clearance.  
Call (608) 266-2772 to request the form be completed by the Wisconsin Department of Revenue. If all income went to the primary beneficiary's social security number, submit a statement from the trustee or beneficiary stating this instead of the Closing Certificate for Fiduciaries.
5. **File Documents** - Mail them to the Probate Office. The court will review and presumably enter an Order Terminating Trust and send a conformed copy back to the Trustee.
6. **Distribute Funds and Obtain Receipts** - Ask distributees to sign Trust Receipts and file them with the court.
7. **Order Discharging Trustee** - When final receipt and Closing Certificate for Fiduciaries have been filed, the court will sign this order discharging the trustee and terminating the bond, if any.

Mail Documents to:  
Dane County Probate Office - Room 1005  
215 S Hamilton Street  
Madison WI 53703

(608) 266-4331

In re the Trust Estate of:

**PETITION FOR TERMINATION OF TRUST**

\_\_\_\_\_

Case No.: \_\_\_\_\_

f/b/o \_\_\_\_\_

The petitioner, \_\_\_\_\_ is the trustee of the decedent's testamentary trust and has administered the trust in accordance with the terms of the decedent's will.

The trust should now be terminated because of the occurrence of the following event specified in the Will:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The persons interested in this trust termination proceeding are:

**NAME OF INTERESTED PERSON**

**ADDRESS**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The waivers of all the interested persons have been filed.

The annual accountings have been filed and the final account of the trustee through the date of \_\_\_\_\_, is on file with the court with an ending balance of \$ \_\_\_\_\_.

Petitioner therefore asks for an order of the court:

1. Approving the accountings filed with the court
2. Terminating the trust and distributing the remaining assets in the trust in accordance with the terms of the decedent's will as follows:

\_\_\_\_\_  
\_\_\_\_\_

3. Discharging the trustee and releasing the trustee's bond, if any, after all the receipts and the Closing Certificate for Fiduciaries have been filed.

Dated \_\_\_\_\_

Subscribed and sworn to before me  
this \_\_\_\_\_ day of \_\_\_\_\_

\_\_\_\_\_  
Notary Public, \_\_\_\_\_ County, Wisconsin  
My commission

\_\_\_\_\_  
Trustee's Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Address