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 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
_____ 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 Declaration 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-1853 Letters of Special Administration

TO CLOSE SPECIAL ADMINISTRATION:

_____ PR-1854 Petition for Discharge of Special Administrator
_____ 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/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.

Please call (608) 266-4331 for an appointment for all future conferences

PR Numbered Forms available on internet at: http://www.wicourts.gov/forms1/circuit/index.htm
Add'l Info @ Probate Office website: https://courts.danecounty.gov/Prepare/Probate
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.