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## INFORMAL ADMINISTRATION

EAU CLAIRE COUNTY COURTHOUSE  
REGISTER IN PROBATE OFFICE  
721 OXFORD AVENUE, ROOM 2201  
EAU CLAIRE, WI 54703

HOURS:  
MONDAY – FRIDAY  
8:00 AM – 4:30 PM

PHONE: 715-839-4823

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**NOTE:** This guideline is provided only as a public service and is not meant to be legal advice. The Register in Probate office cannot give legal advice. Please contact an attorney if you have legal questions.

### **TO OPEN AN INFORMAL ADMINISTRATION**

#### **FIRST STEP:**

- If you wish to eFile this proceeding, see the eFiling section at the end of this document.
- Complete the forms listed below. Once the forms are completed, **call the Register in Probate office to make an appointment to file the documents.** Bring the following completed forms to your appointment for filing:

<b><u>Form #</u></b>	<b><u>Form Name</u></b>
<input type="checkbox"/> PR – 1801	Application for Informal Administration
<input type="checkbox"/> PR – 1806	Proof of Heirship
<input type="checkbox"/> PR – 1803	Waiver and Consent
<input type="checkbox"/> PR – 1802	Declination to Serve (only complete if a person nominated as personal representative in the Will declines to serve)
<input type="checkbox"/> PR – 1807	Consent to Serve
<input type="checkbox"/> PR – 1804	Notice to Creditors (OR, if waivers are not filed, complete PR-1805)
<input type="checkbox"/> PR – 1805	Notice Setting Time to Hear Application and Deadline for Filing Claims*
<input type="checkbox"/> PR – 1808	Statement of Informal Administration
<input type="checkbox"/> PR – 1810	Domiciliary Letters
<input type="checkbox"/> Original	Will and any Codicils (copy to be provided to all interested persons)
<input type="checkbox"/> Bond	A bond may be required prior to appointment of the personal representative. If required, a determination will be made whether bond will be a signature bond (Forms PR – 1809A and PR – 1809B) or a surety bond.

\*Personal Representative (PR) will be appointed after the hearing date listed on the Notice Setting Time to Hear Application and once the following documents are filed: Affidavit of Publication from the newspaper and form PR – 1817 Affidavit of Service showing proof that the Notice was mailed to the interested persons.

**AFTER APPOINTMENT:** complete and file the originals of the following:

#### **SECOND STEP: INVENTORY**

<b><u>Form #</u></b>	<b><u>Form Name</u></b>
<input type="checkbox"/> PR – 1811	Inventory <b>DUE</b> no later than 4 months after Domiciliary Letters are issued
<input type="checkbox"/> Filing Fee	Statutory inventory filing fee of <b>0.2%</b> of the net value of the assets is due with the inventory
<input type="checkbox"/> PR – 1817	Affidavit of Service – inventory to interested persons

#### **THIRD STEP: ESTATE ACCOUNT**

<b><u>Form #</u></b>	<b><u>Form Name</u></b>
<input type="checkbox"/> PR – 1814	Estate Account with attached schedules
<input type="checkbox"/> PR – 1817	Affidavit of Service– estate account to interested persons

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Note Additional property listed is subject to the **0.2%** filing fee

### FOURTH STEP: CLOSING DOCUMENTS

<b>Form #</b>	<b>Form Name</b>
<input type="checkbox"/> PR – 1815	Estate Receipt from heirs/beneficiaries for partial and/or full distributions
<input type="checkbox"/> PR – 1815	Estate Receipt from claimants, if claims were filed
<input type="checkbox"/> Original	Affidavit or Proof of Publication from newspaper
<input type="checkbox"/> Copy	Funeral Receipt marked paid in full
<input type="checkbox"/> Original	Closing Certificate for Fiduciary from WI Dept of Revenue (see below)
<input type="checkbox"/> PR – 1816	Personal Representative's Statement to Close Estate

**PROBATE CLAIMS NOTICE:** It is the PR's responsibility to complete this form and provide a copy to the WI Department of Health Services and County Clerk.

**CLAIMS:** It is the PR's responsibility to check the court record for any claims filed. The website is: <http://wcca.wicourts.gov/index.xsl>. Copies can be obtained from the Register in Probate office for a fee of \$1.00 per page.

**CLOSE ESTATE:** Estate shall be closed 12 months after the Application is filed pursuant to 10th Judicial District benchmarks.

**CERTIFIED COPIES:** If requested, are \$3.00 for the certification and \$1.00 for each page copied and compared. If requested through the mail, please enclose a self-addressed, stamped envelope together with the correct fee.

**ADDITIONAL RESOURCES:** A booklet called "A Personal Representative's Guide to Informal Probate in Wisconsin" is available online as follows:

1. Go to: <https://www.eauclairecounty.gov>
2. Once on the site, click on:
  - a. Our Government (on menu bar)
  - b. Department Directory
  - c. Register in Probate
  - d. Documents
  - e. Probate Documents
  - f. Personal Representative's Guide to Informal Probate

**FORMS:** additional/duplicate forms can be found at: [www.wicourts.gov](http://www.wicourts.gov)

**EFILING:** eFiling of cases is now available. To register for an eFiling account: [www.wicourts.gov](http://www.wicourts.gov). Click **eFiling** on the menu bar and then click on the **Circuit court eFiling** from the drop down menu. Follow the instructions to register for an eFiling account and filing instructions.

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**WISCONSIN TAX FORMS:** <https://www.revenue.wi.gov/Pages/FAQS/ise-estate.aspx>

**CLOSING CERTIFICATE FOR FIDUCIARIES:** A Closing Certificate for Fiduciaries is required before closing the estate. Request the Closing Certificate by completing Schedule CC and any other necessary fiduciary tax returns. Submit Schedule CC and any fiduciary returns together with all requested documents by electronically filing or mailing to: Wisconsin Department of Revenue, PO Box 8918, Madison, WI 53708-8918. Filing of the fiduciary, estate tax, and income tax returns is the PR's responsibility.

**IRS NOTICE:** The Internal Revenue Service may be a creditor of the decedent and should be promptly notified of the death and any probate proceeding. Form 56 – Notice Concerning Fiduciary Responsibility is included with this guideline or can be found at [www.irs.gov](http://www.irs.gov)