SUMMARY ASSIGNMENT

ST. CROIX COUNTY
PROBATE OFFICE
1101 CARMICHAEL RD.
HUDSON, WI 54016

PHONE: 715-386-4618

HOURS:
MONDAY – FRIDAY
8:00 AM – 5:00 PM

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 A SUMMARY ASSIGNMENT: complete and file the following:

PR – 1840	Petition for Summary Assignment (inventory filing fee due; see below)
PR – 1806	Proof of Heirship
PR – 1846	Waiver and Consent
PR – 1842	Notice to Creditors for Summary Assignment OR
PR – 1843	Order & Notice of Hearing Petition of Summary Assignment (if required, see below**)
Original	Will and any Codicils
Original	Probate Claims Notice

**PR-1843 required if Waiver and Consents are not or cannot be obtained from all interested persons.

FEE: A statutory inventory filing fee is due when the petition is filed. The fee is .2% of the assets or a minimum of $20.00 if the assets are under $10,000.00. See sec. 814.66, Wis. Stats.

SPECIAL ADMINISTRATOR: Special Administration letters can be requested, if necessary, at the same time the estate is opened. See below.

AFTER ESTATE IS OPENED AND INVENTORY FILING FEE IS PAID:

1. Deliver Notice to Creditors or Order & Notice of Hearing Petition to newspaper for publication.
2. Mail the Order & Notice of Hearing Petition (if this form was filed) to all interested persons.
3. Mail a copy of Probate Claims Notice to the County Clerk and by certified mail to the Department of Health Services Estate Recovery Program Section.

AFTER NOTICE IS PUBLISHED, FILE THE FOLLOWING:

PR – 1841	Affidavit of Additional Property and/or Creditor for Summary Assignment – if additional assets are found and/or not listed on the Petition; additional filing fee is also due of .2%. Also use if additional creditors are discovered.
PR – 1817	Affidavit of Service – of the Order & Notice of Hearing to all interested persons
Original	Affidavit or Proof of Publication from newspaper
Proof	Certified mail receipt card showing Probate Claims Notice was mailed
PR – 1844	Order on Petition for Summary Assignment
PR - 1817	Affidavit of Service – of the Order on Petition for Summary Assignment

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AFTER CLAIMS DATE; TO CLOSE ESTATE:

PR – 1815	Estate Receipt from all heirs/beneficiaries for full distributions
PR – 1815	Estate Receipt from claimants, if claims were filed
PR - 1854	Petition for Discharge of Special Administrator
PR – 1855	Order Discharging Special Administrator (if Special Administrator was appointed)

TO BE APPOINTED SPECIAL ADMINISTRATOR: complete the following forms and file with the Petition for Summary Assignment:

PR - 1807	Consent to Serve
PR - 1852	Order for Special Administration
PR - 1853	Letters of Special Administration

- A Bond may be required by the Court before letters can be issued.
- Certified copies of the Letters of Special Administration can be obtained from the Register in Probate office. If requested, the statutory fees are $3.00 for each 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.

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. The IRS Notice is included with this guideline.

FORMS: additional/duplicate forms can be found at: http://www.wicourts.gov