
SUMMARY ASSIGNMENT

POLK COUNTY
PROBATE OFFICE
1005 W. MAIN STREET, SUITE 500
BALSAM LAKE, WI 54810

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

PHONE: 715-485-9238

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	Summary Assignment Petition (inventory filing fee due; see below)
PR – 1806	Proof of Heirship
PR – 1846	Waiver and Consent
PR – 1842	Summary Assignment – Notice to Creditors OR
PR – 1843	Summary Assignment – Order for Hearing and Notice (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 for Hearing and Notice to newspaper for publication.
2. Mail the Order for Hearing and Notice (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 and Family Services.

AFTER NOTICE IS PUBLISHED, FILE THE FOLLOWING:

PR – 1841	Summary Assignment Affidavit – if additional assets are found and/or not listed on the Petition; additional filing fee is also due of .2%
PR – 1817	Affidavit of Mailing – of the Order for Hearing and Notice 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	Summary Assignment – Findings and Order

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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 – 1855	Special Administration – Order of Discharge (if Special Administrator was appointed)

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

PR - 1807	Consent to Serve
PR - 1852	Special Administration - Order Appointing Special Administrator
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: www.wicourts.gov