
SUMMARY SETTLEMENT

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

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

PHONE: 715-485-9283

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 SETTLEMENT: complete and file the originals of the following:

PR – 1835	Summary Settlement Petition
PR – 1846	Waiver and Consent
PR – 1836	Summary Settlement - Order for Hearing and Notice (<u>optional</u> ; in most instances a hearing is not required)
Original	Will and any Codicils (unless already filed with the Court)
Filing Fee	Statutory inventory filing fee of 0.2% of the assets is due on the value of the assets or a minimum of \$20.00 if the assets are less than \$10,000.00

- **FILING THE FORMS:** be sure to complete ALL applicable sections of each form prior to filing them with the Probate office.
- **NOTE:** if you need to be appointed Special Administrator, complete questions 8 and 10 on page 3 of the Summary Settlement Petition; see below.

TO CLOSE A SUMMARY SETTLEMENT: complete and file the originals of the following:

PR – 1837	Summary Settlement – Findings and Order: make sure all sections of this form are complete, including page 3 under “Person(s) Entitled to Receive”.
PR – 1817	Affidavit of Mailing showing proof that form PR-1836 was mailed to every person entitled to notice. OR
Original	Proof of Publication if the Court required publication of form PR-1836.

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

PR - 1807	Consent to Serve
PR - 1852	Special Administration - Order Appointing Special Administrator: only required if the Summary Settlement Findings and Order is not signed immediately.
PR - 1853	Letters of Special Administration A hearing may be required by the Court if you are requesting appointment with “all the general powers, duties and liabilities as personal representative”. If you are requesting “specific powers”, a hearing is usually not necessary, but may also be required by the Court.

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TO CLOSE THE SPECIAL ADMINISTRATION: complete and file the originals of the following:

PR – 1854	Special Administration - Petition for Discharge
PR – 1815	Estate Receipt from heirs/beneficiaries
PR – 1855	Special Administration – Order of Discharge

CERTIFIED COPIES: \$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.

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