

1005 W. Main Street, Suite 500 Balsam Lake, WI 54810	Polk County Register in Probate Office	Phone: 715-485-9238 Hours: 8:30 AM – 4:30 PM
GUIDELINE	TRANSFER BY AFFIDAVIT (\$50,000 and under)	Rev. 02/09

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 or complete the form for you. Please contact an attorney if you have legal questions or concerns.

READ THE FORM THOROUGHLY PRIOR TO COMPLETING THE FORM:

1. If the deceased had an original Will, please file it with the Register in Probate (ask for Affidavit of No Probate information). The original Will should be filed with the Probate Office even if there are no assets that require probate.
2. Answer all of the questions on Pages 1 and 2 of the Transfer by Affidavit.
3. Use blank ink only.
4. Mark the appropriate boxes in questions 5 and 6 (see page 3 of the Affidavit for additional information).
5. Do not sign the form until you are in front of a Notary Public.
6. Print or type the affiant's name at the bottom of Page 2 after the words "this document was drafted by."
7. If you answered all of the questions in 5 and 6 as "did not" receive any aid, proceed with the additional information on Page 3 of the Affidavit.
8. The original of the Affidavit along with a certified copy of the death certificate should be presented to the bank or other institution listed on Page 2. You should retain a copy of the Affidavit for your records.

If the decedent DID receive some sort of assistance, please continue:

1. If you answered any part of Questions 5 and 6 indicating the deceased "DID" receive some sort of assistance, proceed with instructions on Page 3 of the Affidavit.
2. Send one **copy** of the Affidavit by certified mail, return receipt requested to: Dept. of Health & Family Services, Estate Recovery Program, P.O. Box 309, Madison, WI 53701-0309.
3. Keep the original for your records. When you receive the green receipt card from the Dept. of Health & Family Services, you must wait 10 days before you can transfer asset. After 10 days, you may then present the Affidavit, death certificate and return receipt card to the bank in order to have funds transferred. Be sure to retain a copy of the form for your records. If the State has a claim to this money, they will contact you. Please note, it may not be within the 10-day waiting period.

NOTE: Form PR-1831 *is not* filed with the Register in Probate Office/Probate Court.

**FORMS: Additional/duplicate copies of Form PR-1831 can be found at www.wicourts.gov