

**POLK COUNTY**  
**REGISTER IN PROBATE/PROBATE REGISTRAR**  
Polk County Justice Center  
1005 W. Main Street, Suite 500  
Balsam Lake, WI 54810

Phone:  
(715) 485-9238

Hours:  
8:30 a.m. -4:30 p.m.  
Monday - Friday

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NOTE: The guideline is provided only as a public service and is not meant to be legal advice. If you have legal questions, please contact an attorney as Probate staff cannot give legal advice.

**GUIDELINES FOR PREPARING ANNUAL ACCOUNTS**

**COMPLY WITH THE FOLLOWING:**

1. Read the instructions on the 'Notice to Make Annual Filing' form.
2. Page 2 of the account, Schedule B: categorize personal expenses (example: clothing, medical, etc.); do not use "miscellaneous" to explain expenses.
3. Page 3 of the account, verification of assets: an official from a financial institution (indicate title and name of bank), an investment representative, or the Register in Probate office must verify the balance of the assets on hand as of the end of the year. OR copies of documents must be attached showing the balances as of December 31.
4. Sign the account in front of a notary public.
5. Check your math on all pages; the account must balance.
- 6. FILE THE ACCOUNT BY APRIL 15;** this is a statutory requirement.

**THE ACCOUNT WILL BE RETURNED FOR CORRECTION IF:**

1. The verification of assets is not correct. A notary public **cannot** verify the assets; the guardian **cannot** verify the assets; see #3 above.
2. The account is not signed and notarized.
3. The account does not balance.
4. The attachments for the verification of the assets (copies of bank or investment account statements showing the December 31 balance) are not enclosed.
5. The Court requests clarification on any other item or issue.

**NOTE:** The Register in Probate office **cannot** complete the account for you.

***ALL ANNUAL ACCOUNTS ARE DUE BY APRIL 15***