

	Marquette County Probate Court	
GUIDELINE: 1840	SUMMARY ASSIGNMENT	Revised: December 11, 2015 Page 1 of 2

PLEASE NOTE: This Guideline is provided as a public service and is not intended to be legal advice. If you have any questions, about the form or the procedure, please contact an attorney as Probate staff members cannot give legal advice.

FORMS:

- A packet of forms is available from the Register in Probate for \$10.00.
- The forms may be accessed on the internet at: <http://www.wicourts.gov/forms1/circuit.htm>.
- The forms are available on the internet as a fillable Word document and as a PDF document which may be printed and filled in by hand.

TO OPEN A SUMMARY ASSIGNMENT proceeding, please file the following:

SPECIAL	Form Number	Name of Form
	PR-1840.DOC PR-1840.PDF	Petition for Summary Assignment
	PR-1806.DOC PR-1806.PDF	Proof of Heirship
	PR-1846.DOC PR-1846.PDF	Waiver and Consent from all interested parties
	Fees	An Inventory Filing fee of .2% of assets or a minimum of \$20 is due when the Petition is filed. (See Sec. 814.66, Wis. Stats.)
	Will (if any)	Original Will
	PR-1843.DOC PR-1843.PDF	Proposed Order and Notice of Hearing Petition of Summary Assignment (if required) In most cases, a hearing is not required by the Court, but may be set depending on individual circumstances.
	PR-1842.DOC PR-1842.PDF	Proposed Notice to Creditors for Summary Assignment Complete all blanks except the case number and date that property is to be assigned. After Court personnel have entered the date and case number, a copy must be taken to the West Bend News for publication.

ADMINISTRATOR: If you also need to be appointed Special Administrator, please see next page.

AFTER NOTICE TO CREDITORS IS PUBLISHED, file the following:

Form Number	Name of Form
Obtain from Newspaper	Proof of Publication (showing date that newspaper published the notice to creditors)
PR-1817.DOC PR-1817.PDF	If decedent received any benefits or if information unknown, see #9 on petition. Affidavit of Service to Wisconsin Dept. Health Services Estate Recovery Program, P.O. Box 309, Madison, WI 53701-0309
PR-1841.DOC PR-1841.PDF	Affidavit of Additional Property and/or Creditor for Summary Assignment Must be completed and filed if a detailed list of assets is not provided in the petition.
PR-1844.DOC PR-1844.PDF	Proposed Order on Petition for Summary Assignment

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APPOINTED SPECIAL ADMINISTRATOR at the same time you open the **Summary Assignment**, complete and file the following:

Form Number	Name of Form
See PR-1840	Use the Petition as noted above
PR-1807.DOC PR-1807.PDF	Consent to Serve
PR-1852.DOC PR-1852.PDF	<i>Proposed Order Appointing Special Administrator</i>
PR-1853.DOC PR-1853.PDF	<i>Proposed Letters of Special Administrator</i>

- A bond may be required before Letters can be issued. This would be decided by the Court and based on the value of the estate, the type of assets and the terms of the will.
- If you need certified copies of Orders or Letters, the statutory fee applies of \$3.00 for the certificate and \$1.00 for each page to be certified.

TO CLOSE THE SPECIAL ADMINISTRATION, please file the following:

Form Number	Name of Form
PR-1854.DOC PR-1854.PDF	Petition for Discharge
PR-1815.DOC PR-1815.PDF	Estate Receipt One required from each heir
PR-1855.DOC PR-1855.PDF	<i>Proposed Order Discharging Special Administrator</i>