

**Request for a Closing Certificate
 for Fiduciaries**

**Attach to
 Wisconsin
 Form 2**

PART I – Information Required When Requesting a Closing Certificate for Estates (Trusts see Part II on page 2)

Legal last name	First name and middle initial	Decedent's social security number	Federal EIN

- Did the decedent have a will? Yes No
- Type of probate Formal Informal Other _____
- Attach a copy of the inventory and will.
- Was a federal estate tax return (Form 706) filed? Yes No If Yes, date filed _____
- If the gross estate plus adjusted taxable gifts was more than \$675,000, was a Wisconsin estate tax return (Form W706) filed? Yes No If Yes, date filed _____
- If the decedent did not file tax returns prior to death, state the decedent's approximate income for the past 4 years:
 20__ \$ _____, 20__ \$ _____, 20__ \$ _____, 20__ \$ _____.
- Was the decedent contacted by the IRS and/or Wis. Dept. of Revenue in the last 3 years? Yes No
 If Yes, explain: _____

- Attach a copy of the final account to the final Form 2.
- Is a certificate required by the court? Yes No See page 3 of the Form 2 instructions.
- Enter the totals of each of the assets and deductions listed below. (**NOTE** Where any line is left blank and the appropriate schedule for that line is not filed with this return, it will be deemed that **NONE** is the **DECLARATION** for that line by the person(s) signing Form 2.)

Probate Assets

a. Real Estate	10a.	_____	.00
b. Stocks and Bonds	10b.	_____	.00
c. Mortgages, Notes, and Cash	10c.	_____	.00
d. Insurance Payable to Estate	10d.	_____	.00
e. Other Miscellaneous Property	10e.	_____	.00
f. Total Probate Assets (add lines 10a through 10e)	10f.	_____	.00

Nonprobate Assets

g. Jointly Owned Survivorship – Decedent's Share of Jointly Owned Property	10g.	_____	.00
h. Decedent's Share of Survivorship Marital Property ..	10h.	_____	.00
i. Insurance Payable to Named Beneficiaries	10i.	_____	.00
j. Transfers During Decedent's Life (gifts, etc.)	10j.	_____	.00
k. Annuities and Employee Death Benefits	10k.	_____	.00
L. Other Assets	10L.	_____	.00
m. Total of Nonprobate Assets (add lines 10g through 10L)	10m.	_____	.00
n. Wisconsin GROSS Estate (add lines 10f and 10m)	10n.	_____	.00

Deductions

o. Funeral Expenses	10o.	_____	.00
p. Administration Expenses	10p.	_____	.00
q. Debts of Decedent	10q.	_____	.00
r. Mortgages and Liens	10r.	_____	.00
s. Total Deductions (add lines 10o through 10r)	10s.	_____	.00
t. Wisconsin TAXABLE Estate (subtract line 10s from line 10n)	10t.	_____	.00

NOTE If an estate is not required to file Form 2 and needs a closing certificate, see page 3 of the Form 2 instructions.

PART II – Information Required When Requesting a Closing Certificate for Trusts

Legal Name	Federal EIN
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1. Attach a copy of the trust instrument with amendments (will / codicils) and copies of annual court accountings for past three years.
2. a. Name(s) of grantor(s) _____
 Social security number(s) _____
- b. Name(s) of grantee(s) _____
 Social security number(s) _____
3. On what date was the trust funded? _____
4. Was the trust contacted by the IRS and/or Wis. Dept. of Revenue in the last 3 years? Yes No If Yes, explain:

- 5a. State reason for closing the trust _____

- b. If death of beneficiary, provide name of beneficiary, social security number, last address, and date of death.

6. Have you petitioned the court to close the trust? Yes No
 If Yes, attach a copy of the petition.
 If No, explain why no petition has been filed _____

7. Has the trust made an annual accounting to a court? Yes No If No, explain _____

8. Is a certificate required by the court? Yes No See page 3 of the Form 2 instructions
9. Enter the total fair market value of each of the assets listed below that are held by the trust at the end of the year preceding the final year of the trust. **(NOTE** Where any line is left blank and the appropriate schedule for that line is not filed with this return, it will be deemed that **NONE** is the **DECLARATION** for that line by the person(s) signing Form 2.)

a. Real Estate	9a. _____	.00
b. Stocks and Bonds	9b. _____	.00
c. Mortgages, Notes, and Cash	9c. _____	.00
d. Annuities and Life Insurance	9d. _____	.00
e. Interest in Partnerships, LLCs, and S Corporations	9e. _____	.00
f. Other Miscellaneous Property	9f. _____	.00
g. Total Assets (add lines 9a through 9f)	9g. _____	.00