



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)

Table with 4 columns: Legal last name, First name and middle initial, Decedent's social security number, Federal EIN

- 1. Did the decedent have a will?
2. Type of probate
3. Attach a copy of the inventory and will.
4. Was a federal estate tax return (Form 706) filed?
5. If the gross estate plus adjusted taxable gifts was more than \$675,000, was a Wisconsin estate tax return (Form W706) filed?
6. If the decedent did not file tax returns prior to death, state the decedent's approximate income for the past 4 years:
7. Was the decedent contacted by the IRS and/or Wis. Dept. of Revenue in the last 3 years?

- 8. Attach a copy of the final account to the final Form 2.
9. Is a certificate required by the court?
10. 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

Table with 2 columns: Asset description, Amount. Rows include Real Estate, Stocks and Bonds, Mortgages, Notes, and Cash, Insurance Payable to Estate, Other Miscellaneous Property, and Total Probate Assets.

Nonprobate Assets

Table with 2 columns: Asset description, Amount. Rows include Jointly Owned Survivorship - Decedent's Share of Jointly Owned Property, Decedent's Share of Survivorship Marital Property, Insurance Payable to Named Beneficiaries, Transfers During Decedent's Life (gifts, etc.), Annuities and Employee Death Benefits, Other Assets, Total of Nonprobate Assets, and Wisconsin GROSS Estate.

Deductions

Table with 2 columns: Deduction description, Amount. Rows include Funeral Expenses, Administration Expenses, Debts of Decedent, Mortgages and Liens, Total Deductions, and Wisconsin TAXABLE Estate.

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**

<b>Legal Name</b>	Federal EIN
-------------------	-------------

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. <b>Total Assets</b> (add lines 9a through 9f) . . . . .	9g. _____	<b>.00</b>