

Request for a Closing Certificate
for Fiduciaries

2018

Use
BLACK INK

Wisconsin Department of Revenue

DO NOT STAPLE

ESTATES ONLY – Decedent's last name		Decedent's first name		M.I.	Decedent's social security number
TRUSTS ONLY – Legal name					Estate's/Trust's federal EIN
Individual or firm to whom the closing certificate should be mailed			Attention or c/o		County of jurisdiction
Address					Probate case number
City		State	Zip code	Date of decedent's death (MM DD YYYY)	

PART I Information Required When Requesting a Closing Certificate for Estates

Complete lines 1 through 11 and sign on page 2.

- Is a certificate required by the court? ☐ Yes ☐ No *See instructions.*
- Does the decedent have a will? ☐ Yes ☐ No (If Yes, enclose a copy)
- Type of probate ☐ Formal ☐ Informal ☐ Other _____
- If the decedent did not file tax returns for the 4 years prior to death, enter the year and the decedent's approximate income:
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: _____
- Is the gross income of the estate less than \$600? ☐ Yes ☐ No
- Will a final Form 2 be filed at a later date? ☐ Yes ☐ No
- Was the decedent a resident of Wisconsin at the time of death? ☐ Yes ☐ No
- Did the decedent own an interest in any partnership, S corporation, LLC, or LLP? ☐ Yes ☐ No
- Enter the totals of each of the assets listed below.

**Probate Assets** (Enclose a copy of the inventory)**NO COMMAS; NO CENTS**

- | | | | |
|--|------------|-------|-----|
| a. Real Estate | 10a | _____ | .00 |
| b. Stocks and Bonds | 10b | _____ | .00 |
| c. Mortgages, Notes, and Cash | 10c | _____ | .00 |
| d. Land Contracts and Installment Sales | 10d | _____ | .00 |
| e. Insurance Payable to Estate | 10e | _____ | .00 |
| f. Annuities and Employee Death Benefits Payable to Estate ... | 10f | _____ | .00 |
| g. Other Miscellaneous Property | 10g | _____ | .00 |

Nonprobate Assets

- | | | | |
|--|------------|-------|-----|
| h. Jointly Owned Survivorship – Decedent's Share of Jointly Owned Property | 10h | _____ | .00 |
| i. Decedent's Share of Survivorship Marital Property | 10i | _____ | .00 |
| j. Insurance Payable to Named Beneficiaries | 10j | _____ | .00 |
| k. Transfers During Decedent's Life (gifts, etc.) | 10k | _____ | .00 |
| L. Other Assets | 10L | _____ | .00 |

m. Wisconsin GROSS Estate (add lines 10a through 10L)	10m	_____	.00
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11. Fiduciary fees paid or payable to the personal representative or trustee	11	_____	.00
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NOTE

Where any line from 10a through 10L is left blank, it will be deemed that **NONE** is the **DECLARATION** for that line by the person(s) signing Schedule CC.

DO NOT ATTACH SCHEDULE CC TO FORM 2 (see instructions)

PART II Information Required When Requesting a Closing Certificate for Trusts

Complete lines 1 through 10 and sign below.

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

6. State reason for closing the trust. If death of beneficiary, provide name of beneficiary, social security number, last address, and date of death. _____

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

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

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 from 9a through 9f is left blank, it will be deemed that **NONE** is the **DECLARATION** for that line by the person(s) signing Schedule CC.)
- | | | |
|---|-----------|-----|
| 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 |
10. Fiduciary fees paid or payable to the personal representative or trustee **10** .00

Third Party Designee Do you want to allow another person to discuss this return with the department (*see instructions*)? ☐ **Yes** Complete the following. ☐ **No**

Designee's name ▶	Phone no. ▶ ()	Personal identification number (PIN) ▶					
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I, as fiduciary, declare under penalties of law that I have examined this schedule (including accompanying documents and statements) and to the best of my knowledge and belief it is true, correct, and complete.

Your signature	Date	Daytime phone ()
PERSON PREPARING FORM if other than the preceding signer	Signature of preparer	Date
		Daytime phone ()

Mail to: Wisconsin Department of Revenue
PO Box 8918, Madison WI 53708-8918