

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 <b>mailed</b>			Attention or c/o		County of jurisdiction (Name Only)
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.

- 1 Is a certificate required by the court? .....  Yes  No (See instructions)  
If no, **DO NOT** submit Schedule CC. The department only issues a Closing Certificate if a court requires it to close a proceeding.
- 2 Does the decedent have a will? .....  Yes  No (If yes, include a copy)
- 3 Type of probate  Formal  Informal  Other \_\_\_\_\_
- 4 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\_\_ \$ \_\_\_\_\_.
- 5 Was the decedent contacted by the IRS and/or Wis. Dept. of Revenue in the last 3 years?  Yes  No  
If yes, explain: \_\_\_\_\_
- 6 Is the gross income of the estate less than \$600? .....  Yes  No
- 7 Will a final Form 2 be filed at a later date? .....  Yes  No
- 8 Was the decedent a resident of Wisconsin at the time of death? .....  Yes  No
- 9 Did the decedent own an interest in any partnership, S corporation, LLC, or LLP? .....  Yes  No



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

10 Enter the totals of each of the assets listed below.

**Probate Assets (Required: Include a copy of the inventory)**

**NO COMMAS; NO CENTS**

<b>a</b> Real Estate .....	<b>10a</b>	_____	.00
<b>b</b> Stocks and Bonds .....	<b>10b</b>	_____	.00
<b>c</b> Mortgages, Notes, and Cash .....	<b>10c</b>	_____	.00
<b>d</b> Land Contracts and Installment Sales .....	<b>10d</b>	_____	.00
<b>e</b> Insurance Payable to Estate .....	<b>10e</b>	_____	.00
<b>f</b> Annuities and Employee Death Benefits Payable to Estate . . .	<b>10f</b>	_____	.00
<b>g</b> Other Miscellaneous Property .....	<b>10g</b>	_____	.00
<b>Nonprobate Assets</b>			
<b>h</b> Jointly Owned Survivorship – Decedent's share of property . .	<b>10h</b>	_____	.00
<b>i</b> Decedent's Share of Survivorship Marital Property .....	<b>10i</b>	_____	.00
<b>j</b> Insurance Payable to Named Beneficiaries .....	<b>10j</b>	_____	.00
<b>k</b> Transfers During Decedent's Life (gifts, etc.) .....	<b>10k</b>	_____	.00
<b>L</b> Other Assets .....	<b>10L</b>	_____	.00
<b>m</b> Wisconsin GROSS Estate (add lines 10a through 10L) .....	<b>10m</b>	_____	.00

**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.

11 Fiduciary fees paid or payable to the personal representative or trustee ..... **11** \_\_\_\_\_ .00

