

Use

## **Request for a Closing Certificate** for Fiduciaries



sin Department of Pevenue . ۱۸/io

			thoma			Deserve	s social security number	
EST	TATES ONLY – Legal last name	Legal firs	st name		M.I.	Decedents	social security number	
TRL	IRUSTS 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		
Add	dress					Probate ca	ise number	
City	у	State	Zip code			Date of dec	cedent's death (MM DD Y)	
PA	ART I Information Required When Requ	esting	a Closing Ce	ertificate fo	or Esta	tes		
on	mplete lines 1 through 11 and sign on page 2.							
	Does the decedent have a will? Yes							
2.	Type of probate 🔛 Formal 🔛 Informal	L Oth	ier					
3.	If the decedent did not file tax returns for the 4 y	ears prio	or to death, ente	er the year a	nd the d	lecedent's	approximate incom	
	20\$, 20\$		_, 20	\$		, 20	\$	
	Was the decedent contacted by the IRS and/or If Yes, explain:	-		in the last 3	years?	Yes	No	
5.	Is the gross income of the estate							
	less than \$600?	Ye	s No					
	Will a final Form 2 be filed at a later date?							
6.		Ye	s 🔄 No	See instruc	ctions.			
6. 7.	Will a final Form 2 be filed at a later date? Is a certificate required by the court? Was the decedent a resident of Wisconsin	Yes	s 🛄 No s 🛄 No					
6. 7. 8.	Will a final Form 2 be filed at a later date? Is a certificate required by the court? Was the decedent a resident of Wisconsin at the time of death? Did the decedent own an interest in any	Yes Yes Yes	s No s No s No					
6. 7. 8. 9.	Will a final Form 2 be filed at a later date?Is a certificate required by the court?Was the decedent a resident of Wisconsinat the time of death?	Ye: Ye: Ye: Ye:	s No s No s No					
5. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> <li>Enter the totals of each of the assets listed below</li> </ul>	Ye: Ye: Ye: Ye: w.	s No s No s No					
5. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> </ul>	Ye: Ye: Ye: Ye: w.	s No s No s No s No	<u>NO</u> сомм				
6. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> <li>Enter the totals of each of the assets listed belo</li> <li>Probate Assets (Enclose a copy of the inventor)</li> </ul>	Ye: Ye: Ye: Ye: w. <i>my)</i>	s No s No s No s No	<u>NO</u> сомм		CENTS		
5. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> <li>Enter the totals of each of the assets listed below</li> <li>Probate Assets (Enclose a copy of the inventor a. Real Estate</li></ul>	Ye: Ye: Ye: w. <i>w.</i> <i>wy)</i>	s No s No s No s No	<u>NO</u> COMM	AS; <u>NO</u> (	CENTS		
5. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> <li>Enter the totals of each of the assets listed belo</li> <li><b>Probate Assets</b> (Enclose a copy of the inventor a. Real Estate</li> <li>b. Stocks and Bonds</li> <li>c. Mortgages, Notes, and Cash</li> </ul>	Ye: Ye: Ye: w. nry) 	s No s No s No s No 	<u>NO</u> СОММ а	AS; <u>NO</u> (	CENTS .00 .00	NOTE	
6. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> <li>Enter the totals of each of the assets listed belo</li> <li>Probate Assets (Enclose a copy of the inventor a. Real Estate</li></ul>	Ye: Ye: Ye: w. ory) 	s No s No s No s No s No 	<u>NO</u> СОММ а	AS; <u>NO</u> (	CENTS .00 .00 .00	<b>NOTE</b> Where any li	
6. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> <li>Enter the totals of each of the assets listed belo</li> <li><b>Probate Assets</b> (Enclose a copy of the inventor a. Real Estate</li></ul>	Ye: Ye: Ye: w. <i>my)</i>	s No s No s No s No s No 	NO COMM	AS; <u>NO</u> (	CENTS .00 .00 .00 .00	<b>NOTE</b> Where any li from 10a throu 10L is left bla	
6. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li></ul>	Ye: Ye: Ye: w. <i>nry)</i> 	s No s No s No s No s No 	NO COMM	AS; <u>NO</u> (	CENTS .00 .00 .00 .00 .00	<b>NOTE</b> Where any li from 10a throu 10L is left bla it will be deem	
6. 7. 8. 9.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> <li>Enter the totals of each of the assets listed belo</li> <li><b>Probate Assets</b> (Enclose a copy of the inventor a. Real Estate</li></ul>	Ye: Ye: Ye: w. <i>nry)</i> 	s No s No s No s No s No 	NO COMM	AS; <u>NO</u> (	CENTS .00 .00 .00 .00 .00 .00	NOTE Where any li from 10a throu 10L is left blar it will be deem that NONE is t DECLARATIO	
5. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> <li>Enter the totals of each of the assets listed belo</li> <li><b>Probate Assets</b> (Enclose a copy of the inventor a. Real Estate</li> <li>b. Stocks and Bonds</li> <li>c. Mortgages, Notes, and Cash</li> <li>d. Land Contracts and Installment Sales</li> <li>f. Annuities and Employee Death Benefits Pag. Other Miscellaneous Property</li> <li>Nonprobate Assets</li> <li>h. Jointly Owned Survivorship – Decedent's</li> </ul>	Ye: Ye: Ye: Ye: w. nry) 	s No s No s No s No s No s 10a 	NO COMM	AS; <u>NO</u> (	CENTS .00 .00 .00 .00 .00 .00	NOTE Where any li from 10a throu 10L is left blat it will be deem that NONE is t DECLARATIC for that line by t	
5. 7. 3.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li> <li>Was the decedent a resident of Wisconsin at the time of death?</li> <li>Did the decedent own an interest in any partnership, S corporation, LLC, or LLP?</li> <li>Enter the totals of each of the assets listed below</li> <li>Probate Assets (Enclose a copy of the inventor a. Real Estate</li></ul>	Ye: Ye: Ye: w. <i>ry)</i> 	s No s No s No s No s No s No 	NO COMM	AS; <u>NO</u> (	CENTS .00 .00 .00 .00 .00 .00 .00	<b>NOTE</b> Where any li from 10a throu 10L is left blan it will be deem that <b>NONE</b> is t <b>DECLARATIC</b> for that line by t person(s) signi	
6. 7. 8. 9.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li></ul>	Ye: Ye: Ye: w. <i>ny)</i>  yable to 	s No s No s No s No s No s 10a 	NO COMM	AS; <u>NO</u> (	CENTS .00 .00 .00 .00 .00 .00 .00	<b>NOTE</b> Where any li from 10a throu 10L is left blan it will be deem that <b>NONE</b> is t <b>DECLARATIC</b> for that line by t person(s) signi	
6. 7. 8. 9.	<ul> <li>Will a final Form 2 be filed at a later date?</li></ul>	Ye: Ye: Ye: w. <i>nry)</i>  yable to  Property .	s No s No s No s No s No s 10a 10a 10a Estate 10f 10f 10f 10f 10f 10f 10f	NO COMM	AS; <u>NO</u> (	CENTS .00 .00 .00 .00 .00 .00 .00 .0	<b>NOTE</b> Where any li from 10a throu 10L is left blan it will be deem that <b>NONE</b> is t <b>DECLARATIC</b> for that line by t person(s) signi	
6. 7. 8. 9.	<ul> <li>Will a final Form 2 be filed at a later date?</li> <li>Is a certificate required by the court?</li></ul>	Ye: Ye: Ye: w. <i>ny)</i> 	s No s No s No s No s No s 10a 	NO       COMM         a	AS; <u>NO</u> (	CENTS .00 .00 .00 .00 .00 .00 .00 .00 .00 .0	<b>NOTE</b> Where any li from 10a throu 10L is left blar it will be deem that <b>NONE</b> is t <b>DECLARATIC</b> for that line by t person(s) signi	

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

Complete lines 1 through 9 and sign below.

1. Enclose 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 Re	evenue	in the last 3	years? Yes	No If Yes, explain:
5.	a. State reason for closing the trust				
	b. If death of beneficiary, provide name of beneficiary, so	cial sec	urity numbe	r, last address, and	date of death.
6.	Have you petitioned the court to close the trust?		No		
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	L No	See page 15 of t	he Form 2 instructions
9.	Enter the total fair market value of each of the assets listed final year of the trust. ( <b>NOTE</b> Where any line from 9a throug 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

*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 (Individual or firm) if other	er than the preceding signer		
Name	Signature of preparer	Date	Daytime phone
			( )

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