

Use BLACK INK

Wisconsin Department of Revenue

DO NOT STAPLE

Form with fields for decedent information, trustee information, and probate case details.

PART I Information Required When Requesting a Closing Certificate for Estates

Complete lines 1 through 11 and sign on page 2.

- 1. Does the decedent have a will?
2. Type of probate
3. If the decedent did not file tax returns...
4. Was the decedent contacted by the IRS...
5. Is the gross income of the estate less than \$600?
6. Will a final Form 2 be filed...
7. Is a certificate required by the court?
8. Was the decedent a resident of Wisconsin...
9. Did the decedent own an interest in any partnership...
10. Enter the totals of each of the assets listed below.

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

Probate Assets (Enclose a copy of the inventory)

NO COMMAS; NO CENTS

Table with 2 columns: Asset description and Amount. Rows include Real Estate, Stocks and Bonds, Mortgages, etc.

NOTE: Where any line from 10a through 10L is left blank, it will be deemed that NONE is the DECLARATION for that line...

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

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 Revenue 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, social security number, last address, and date of death.

- 6. 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 _____
- 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 15 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 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

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 than the preceding signer		
Name	Signature of preparer	Date Daytime phone ()

Mail to: Wisconsin Department of Revenue
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