

2015 PATS Test #25

Request for a Closing Certificate for Fiduciaries

Name: Test Carnation

Social Security Number: 400-00-5425

Federal Employer Identification Number: 40-4012345

Firm to whom the Closing Certificate Should be Mailed: Rose & Tulip LLP

Attention: Atty White Rose

Address: PO BOX 8906, Madison, WI 53708

Probate County of Jurisdiction: Dane

Probate Case Number: 14PR01

Date of Decedent's Death: 03/11/2014

Test Carnation's Will: Does not have a Will

Type of Probate: Informal

Was the Decedent Contacted by the IRS in the last 3 years: No

Is the Gross Income of the Estate Less than \$600.00: No

Will a Final Form 2 be Filed at a Later Date: Yes

Is a Certificate Required by the Court: Yes

Was the Decedent a Resident of Wisconsin at the Time of Death: Yes

Did the Decedent own an Interest in any Partnership, S Corporation, LLC, or LLP: No

Probate Assets:

Real Estate: \$359,000.00

Stocks and Bonds: \$110.00

Mortgages, Notes, and Cash: \$100.00

Land Contracts and Installment Sales: \$90.00

Insurance Payable to the Estate: \$80.00

Annuities and Employee Death Benefits Payable to Estate: \$70.00

Other Miscellaneous Property: \$60.00

Nonprobate Assets:

Jointly Owned Survivorship – Decedent's Share of Jointly Owned Property: \$50.00

Decedent's Share of Survivorship Marital Property: \$40.00

Insurance Payable to Named Beneficiaries: \$30.00

Transfers During Decedent's Life: \$20.00

Other Assets: \$10.00

Fiduciary Fees: Greater than \$2015.00

Include an Attachment with the Filing: To simulate the required inventory attachment.