

DIRECTIONS FOR COMPLETING THIS FORM

A. WHO MAY USE THIS FORM.

This form may be used by persons entitled to receive property of a decedent under sections 867.045(1) and/or 867.046(2) of the Wisconsin Statutes.

Section 867.045 pertains to the decedent's interest as a joint tenant or life tenant in real property, in vendors' interests in land contracts, or in mortgagees' interests in mortgages. In those instances, the surviving joint tenants or remaindermen may file this form.

Section 867.046(2) pertains to the decedent's interest in real property, in vendors' interests in land contracts, in mortgagees' interests in mortgages, or in savings accounts, checking accounts, or securities (1) specified in a marital property agreement or (2) held as survivorship marital property with the decedent's surviving spouse.

B. WHAT PROPERTY MAY BE TRANSFERRED

This form may be used to transfer only the following non-probate property in which the decedent had an interest:

1. Real estate in Wisconsin. (Includes vendee's interest in a land contract as per OAG opinion 1/97).
2. Vendors' interests in land contracts.
3. Mortgagees' interests in mortgages.
4. Savings accounts and checking accounts.
5. Securities.

C. WHERE SHOULD THIS FORM BE

D. COMPLETING THIS FORM

Complete the form accurately and legibly, **using black ink.**

If needed, ask your attorney for help with legal questions and your register of deeds for information on recording requirements.

If you are transferring securities and bank accounts, your banker may provide assistance, if needed.

Submit with this form:

1. A certified copy of the death certificate.
2. A copy of the document that shows joint tenancy, life estate, survivorship marital property, vendor's interest, or mortgagee's interest.
3. The recording fee of \$25. Your check for \$25 should be made out to "Register of Deeds."

Describing real estate (if any):

1. Attach the complete and accurate legal description of each parcel of real estate. A copy of your deed will have this information but if part of the land was sold off prior to decedent's death, it must be excluded from the legal description.
2. Attach a copy of the real estate tax bill for each parcel for the year immediately preceding the decedent's death. If your county requires a parcel identification number, that number is found on the tax bill.

RECORDED

If the decedent had an interest in real estate, a land contract, or a mortgage, record this form with the Register of Deeds of the county in which the real estate is located. If this form does not include real estate, a land contract, or a mortgage, record this form with the Register of Deeds of the county in which the decedent lived prior to death.

If the decedent had an interest in more than one parcel of real estate, land contract, or mortgage, and the relevant real estate is located in different counties, a separate form must be filed with the Register of Deeds of each county in which the relevant real estate is located. On any form recorded with a Register of Deeds, only list the real estate, land contract, or mortgage related to real estate located in that particular county.

Describing personal property (if any):

1. Securities - Provide the name of the company, the certificate or serial numbers, if any, and the ownership interests (such as number of shares of stock, percentage interest or number of units in a partnership or limited liability company).
2. Savings and Checking Accounts - Provide the name and addresses of each financial institution in which savings and checking accounts are located, along with the account numbers.
3. Vendor's interest in land contracts and mortgagee's interest in mortgages - Attach a copy of your land contract or mortgage containing a legal description of the real estate affected. No tax bill is required for a vendor's or mortgagee's interest.

NOTE: If you are the person(s) receiving the interest, your signature(s) on the form must be notarized.