STATE OF WISCONSIN, CIRCUIT COURT, COUNTY		
IN THE MATTER OF THE ESTATE OF	Transfer by Affidavit (\$50,000 and under)	
		Register of deeds recording area Name and return address
Note: Use black ink only.		parcel identification number
Under oath, I state that:		
The decedent, whose date of birth was, died domiciled in with a post office address of:	Coun	ty, State of,
2. I am: an heir, having the following relation the person who was guardian of the trustee of a revocable trust created	e decedent at the time of the	decedent's death.
3. The total value of the decedent's property sub exceed \$50,000.	pject to administration in Wisc	consin on the date of death did not
4. The total value of the decedent's property subwas \$	pject to administration in Wisc	consin at the date of decedent's death
☐ did ☐ did not receive benefits ☐ did ☐ did not receive benefits	are benefits (through a Care from the Community Options from the Wisconsin Chronic e of a state or county hospita	Disease Program. I or institution, or responsible for any
6. If the decedent was ever married, complete th Name of spouse (☐ living or ☐ deceased): The spouse ☐ did ☐ did not receive The spouse ☐ did ☐ did not receive	-	Options Program (COP). Chronic Disease Program.
7. I ask that the following property be transferred		_

DESCRIPTION OF REAL ESTATE AND/OR PERSONAL PROPERTY	Y TO BE	VALUE
TRANSFERRED (If real estate, list legal description and tax parcel number. If personal	property	
specifically describe property including name of financial institutions ar		
numbers, if any.)		
By accepting the decedent's property under this section, I assume a copyment of obligations according to priorities established under §855		
balance to those persons designated in the appropriate governing in		
Statutes, or if there is no governing instrument, according to the rules		
Wisconsin Statutes.		
Subscribed and sworn to before me		
on		
	Signature	
Notary Public/Court Official	Name Printed or Ty	vned
My commission expires:	Namo i imod oi i y	pod
	Address	
This document was drafted by:		
Print or Ty	pe Name	

If this affidavit describes an interest in or lien on real estate, a certified copy or duplicate original of the affidavit must be recorded with the register of deeds in each county in Wisconsin where the real estate is located.

TRANSFER BY AFFIDAVIT (§867.03, Wisconsin Statutes)

- (1c) DEFINITION. In this section, "guardian" has the meaning given in §880.01(3).
- (1g) GENERALLY. When a decedent leaves property subject to administration in this state which does not exceed \$50,000 in value, any heir of the decedent, trustee of a revocable trust created by the decedent or person who was

Transfer by Affidavit (\$50,000 and under)

guardian of the decedent at the time of the decedent's death may collect any money due the decedent, receive the property of the decedent and have any evidence of interest, obligation to or right of the decedent transferred to the affiant if the heir, trustee or guardian provides to the person owing the money, having custody of the property or acting as registrar or transfer agent of the evidences of interest, obligation to or right, or, if the property is an interest in or lien on real property, provides to the register of deeds preliminary to the recording required under sub. (2m), proof of prior mailed notice under sub. (1m) if applicable and an affidavit in duplicate showing all of the following:

- (a) A description of and the value of the property to be transferred.
- (b) The total value of the decedent's property subject to administration in this state at the date of decedent's death.
- (c) Whether the decedent or the decedent's spouse ever received the family care benefit under §46.286, medical assistance under subch. IV of ch. 49, long-term community support services funded under §46.27(7) or aid under §49.68, 49.683 or 49.685.
- (1m) NOTICE OF AFFIDAVIT. (a) Whenever an heir, trustee or person who was guardian of the decedent at the time of the decedent's death intends to transfer a decedent's property by affidavit under sub. (1g) and the decedent or the decedent's spouse ever received the family care benefit under §46.286, medical assistance under subch. IV of ch. 49, long-term community support services funded under §46.27(7) or aid under §\$49.68, 49.683 or 49.685, the heir, trustee or person who was guardian of the decedent at the time of the decedent's death shall give notice to the department of health and family services of his or her intent. The notice shall include the information in the affidavit under sub. (1g) and the heir, trustee or person who was guardian of the decedent at the time of the decedent's death shall give the notice by certified mail, return receipt requested.
- (b) An heir, trustee or person who was guardian of the decedent at the time of the decedent's death who files an affidavit under sub. (1g) that states that the decedent or the decedent's spouse received the family care benefit under §46.286, medical assistance under subch. IV of ch. 49, long-term community support services funded under §46.27(7) or aid under §§49.68, 49.683 or 49.685 shall attach to the affidavit the proof of mail delivery of the notice required under par. (a) showing delivery date that is not less than 10 days before the day on which the heir, trustee or person who was guardian of the decedent at the time of the decedent's death files the affidavit.
- (2) RELEASE OF LIABILITY OF TRANSFEROR. Upon the transfer to the heir, trustee or person who was guardian of the decedent at the time of the decedent's death furnishing the affidavit with an attached proof of mail delivery if required under sub. (1m) (b), the transferor is released to the same extent as if the transfer had been made to the personal representative of the estate of the decedent.
- (2g) OBLIGATION OF AFFIANT. By accepting the decedent's property under this section the heir, trustee, or guardian assumes a duty to apply the property transferred for the payment of obligations according to priorities established under §859.25 and to distribute any balance to those persons designated in the appropriate governing instrument, as defined in §854.01, of the decedent or if there is no governing instrument, according to the rules of intestate succession under ch. 852. An heir or guardian may publish a notice to creditors in the same manner and with the same effect as a trustee under §701.065. This subsection does not prohibit any appropriate person from requesting administration of the decedent's estate under §856.07 or ch. 865.
- (2m) RECORDING OF AFFIDAVIT. (a) If an affidavit under sub. (1g) describes an interest in or lien on real property a certified copy or duplicate original of the affidavit shall be recorded in the office of the register of deeds in each county in this state in which the real property is located.
- (b) For purposes of a transfer under this section of an interest in or lien on real property, the recording of the affidavit copy or duplicate original constitutes the transfer to the affiant under sub. (1g) of the evidence of the interest in or lien on real property.
- (3) APPLICABILITY. This section is additional to §109.03(3) for payment of decedent's wages by an employer directly to the decedent's dependents.

Address for: Department of Health and Family Services

Estate Recovery Program

P. O. Box 309

Madison, WI 53701-0309

NOTE: If you are providing a copy of this affidavit to the Estate Recovery Program or a financial institution, include decedent's social security number on a separate document.