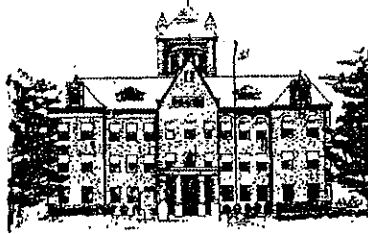


Register in Probate
Monroe County Courthouse
112 South Court Street, Room 301
Sparta WI 54656

Diane Berendes
Register in Probate
Probate Registrar

Telephone: (608) 269-8701
Fax: (608) 269-8950



Circuit Court Judges

Todd L. Ziegler	Branch I
Mark L. Goodman	Branch II
J. David Rice	Branch III

Date: November 4, 2014

To: Trustees of Trusts previously monitored by Monroe County Probate Court

From: Diane Berendes
Monroe County Register in Probate

Re: **2013 Wisconsin Act 92**
Legislation regarding Uniform Trust Code, Uniform Principal and Income Act,
Powers of Appointment, and Changes to Estate Recovery and Divestment

2013 Wisconsin Act 92 took effect in two parts. The estate recovery and divestment changes in 2013 Wisconsin Act 92 became effective on December 15, 2013. The balance of 2013 Wisconsin Act 92 took effect on July 1, 2014. You can find 2013 Wisconsin Act 92 by using the following link:

<http://docs.legis.wisconsin.gov/2013/related/acts/92.pdf>

I would like to make you aware that in 2013 Wisconsin Act 92, under 701.0201(2):

... "Unless ordered by the court upon a petition of a settlor, trustee, or qualified beneficiary requesting continuing judicial supervision, a trust is not subject to continuing judicial supervision." ...

Therefore, in the absence of a petition to the Court as referenced above, you, as Trustee, will no longer be mailed a *Trustee's Account* form to be filed with the Probate Office by April 15th of each year. *Trustee's Accounts* will not be supervised by the Court unless ordered after the filing of a petition.

As Trustee, it is your responsibility to notify the Trust Beneficiaries of this change in the law. The Court requires you to provide the enclosed *Notice to Trust Beneficiaries* to all beneficiaries of the Trust, and to file the enclosed *Affidavit of Mailing* with the Court prior to December 15, 2014, indicating that you have met this responsibility. If you or the Trust Beneficiaries have questions or concerns regarding the effect Wisconsin Act 92 has on Trustees, Settlers and/or Trust Beneficiaries, parties are encouraged to seek legal advice.