

KERRY K. WIDISH  
Chief Deputy Clerk of Court

CARLO ESQUEDA  
DANE COUNTY CLERK OF CIRCUIT COURT/  
REGISTER IN PROBATE

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WAYNE E. PFISTER, JR.  
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DAVID A. FLESCHE  
Probate Registrar

SUSAN PODEBRADSKY  
Guardianship Administrator

LISA CHANDLER  
Paralegal /  
Deputy Probate Registrar

**FILED** December 4, 2014

[REDACTED]

DEC - 5 2014

STATE OF WISCONSIN  
CIRCUIT COURT OF DANE COUNTY

Re: [REDACTED]

Dear [REDACTED]

2013 Wisconsin Act 92 took effect July 1, 2014. The new law provides that as of July 1, 2014, unless court ordered, the Probate Court (the Court) is no longer required to supervise testamentary trusts. Although the Court is not required to supervise, the Court might do so in some cases.

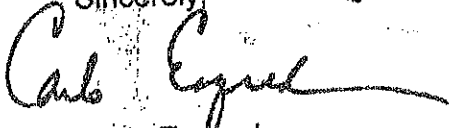
WHAT THIS MEANS FOR YOU

1. While in most cases you will not be ordered to file an annual account, if the Court orders you to file one, then you must.
2. The Court can order that part or all of a case be supervised. This can be done when either the Court initiates required supervision, or a trustee, beneficiary or other interested party requests the Court require supervision.
3. Even if you are not ordered to provide an annual account, you still have legal obligations (fiduciary duties) to the beneficiaries of the trust. You must keep accurate records and provide relevant information to the beneficiaries. It is possible at some point you will be ordered to provide this information to the Court.
4. Make sure you keep the Court updated with any change of address information. If you are notified of any required Court supervision, it will be mailed to you in a court envelope in the form of an Order or information on annual accounting requirements.
5. The new law allows you to end (terminate) a testamentary trust without court approval. However, we **strongly** recommend you get legal advice before terminating any trust.
6. If you need court approval to terminate a trust, we recommend you seek legal advice as you will need to petition the Court and file required documents.

If you have questions or concerns on how Act 92 affects you and your duties as a trustee, you should seek legal advice. The Probate office cannot give any legal advice. Please share this information with your trust beneficiaries.

If you have any questions regarding the process needed in order to petition the Court for court action on a trust matter, please contact the Dane County Probate Court at 608-266-4331.

Sincerely,

A handwritten signature in cursive script that reads "Carlo Esqueda". The signature is written in black ink and is positioned above the printed name.

Carlo Esqueda  
Clerk of Courts