

REGISTER IN PROBATE

# Brown County

100 SOUTH JEFFERSON STREET  
GREEN BAY, WISCONSIN 54301



PHONE (920) 448-4275  
FAX (920) 448-6208

CHERYL A. BEEKMAN  
REGISTER IN PROBATE

July 29, 2014

To: [REDACTED]  
Trustee(s) of Trust presently monitored by Brown County Probate Court

From: Cheryl A. Beekman, Brown County Register in Probate

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

Case: [REDACTED]

Please be aware that the above-referenced 2013 Wisconsin Act 92, in part, contains the new Wisconsin Trust Code. The provisions of the Wisconsin Trust Code take effect on July 1, 2014 and are contained in Chapter 701 of the Wisconsin Statutes.

Sec. 701.0201(2) of the Wisconsin Trust Code states, in part, as follows:

“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.”

As a result, beginning in July, 2014, testamentary trusts will no longer be subject to ongoing court supervision. Trustees of testamentary trusts will no longer be required to file an inventory or annual accounting with the Court. There may be some trusts that, because of pending issues before the court or other unresolved issues, will require continuing supervision. If that is the case, you will be notified of what additional action needs to be resolved.

Please seek legal advice if you have questions or concerns regarding 2013 Wisconsin Act 92 and your continuing role as trustee.

Thank you.