

JUL 10 2014

KIM UTTECH  
Register in Probate  
Probate Registrar



BECKY SCHNEIDER  
Deputy Register  
in Probate

DATE: July 7, 2014  
TO: Trustee(s) of Trust presently monitored by Marathon County  
FROM: Kim Uttech, Marathon County Register in Probate/ku  
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 takes effect in two parts. The estate recovery and divestment change(s) in 2013 Wisconsin Act 92 took effect on December 15, 2013; the balance of 2013 Wisconsin Act 92 took effect on July 1, 2014. You can find the 2013 Wisconsin Act 92 by using the following search 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. Beginning at the end of calendar year 2014, you as Trustee will no longer be mailed an annual account form to be submitted to the Probate Office by April 15<sup>th</sup> each year.

If you have questions or concerns regarding the effect Wisconsin Act 92 has upon you as Trustee, you are encouraged to seek legal advice. You may also want to advise the interested parties of this change.

**In order to close our trust files, the Marathon County Judges are asking for a final accounting from January 1, 2014 to June 30, 2014 to be completed. Enclosed is the final accounting which is due back in the probate office on or before October 1, 2014.**

Probate has enjoyed working with you as a Trustee in regard to the trust(s) you are responsible for.

Enclosure