

JUNEAU COUNTY CIRCUIT COURT

Diane Mortensen

Register in Probate/Juvenile Clerk

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DATE: October 22, 2014

TO: Trustee(s) of trusts currently monitored by the Juneau County Probate Court

FROM: Diane Mortensen, Juneau 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 change(s) in 2013 Wisconsin Act 92 took effect on December 15, 2013; the balance of 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 701.0101(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 the 2014 calendar year, you as Trustee will no longer be mailed an annual account form to be submitted to the Probate office by April 15th each year.

If you have questions or concerns regarding what the effect Wisconsin Act 92 has upon you as Trustee, you are encouraged to seek legal advice.

It has been a pleasure working you as trustee.