

Complete ALL areas where you see this symbol *.

Use BLACK Ink Only

TRANSFER ON DEATH TO BENEFICIARY

* Decedent's Name

* Address of Decedent at Date of Passing (Death)

* City State Zip * Date of Passing (Death)

PRESENTATION OF DEATH CERTIFICATE

I certify I have viewed a *certified copy* of the Decedent's death certificate.

Register of Deed's Signature

Date

INTEREST IN PROPERTY IS TERMINATED under (Check the statute that applies below.)

s. 867.046 which pertains to non-probate transfer of real property under 705.15. An interest in real property may be transferred without probate to a designated TOD beneficiary on the death of the sole owner or last to die of multiple owners.

You must provide a copy of the document showing interest in real estate.

DESCRIPTION OF THE REAL ESTATE

Include only the extent of ownership (or vendor or mortgagee's interest) in land at the *time of the Decedent's death*. If the extent of land is exactly the same as on the document, a copy of that document may be attached to describe the real estate. (See directions on back.) **The legal description of the property and the persons receiving**

the property are as follows: * See Attached (If more space is needed, check box, and attach.)

* Name and Return Address (below)

* Parcel Identification Number (PIN/Tax Key No.)

Description of personal property (if any) being transferred per 705.10(1).

You may list savings accounts, checking accounts and securities on attached pages. Indicate person(s) receiving property.

DECLARATION: I (We) declare that this document is, to the best of my (our) knowledge and belief, true, correct and complete and is in conformity with the provisions and limitations of the Wisconsin Statutes. (If more space is needed, attach pages.)

Write RECORDING information below from Transfer on Death Deed

This Document number is _____, Volume _____, Page _____ of record or deed.

This Document number is _____, Volume _____, Page _____ of record or deed.

Name and address List all remaindermen/beneficiaries receiving property	YOUR relationship to decedent	Signature (notarized)	Date notarized
*	*		

NOTE: This document (when recorded) will serve as the **NEW DEED** to the property listed above.

These sections are to be completed in FRONT of Notary

This document drafted by:

* _____

STATE OF WISCONSIN, County of _____

Signed and sworn to before me on _____ by the above-named person(s).

Signature of Notary or other person authorized to administer an oath as per Sec. 706.06, 706.07

Print or type name: _____

Date Commission expires: _____

DIRECTIONS FOR COMPLETING THIS FORM

Read the directions and complete this form in full

Please note that you will need to have your signature witnessed in the presence of a notary before submitting this form.

A. WHO MAY USE THIS FORM.

This form may be used by the person entitled to receive property of a decedent as a designated Transfer on Death (TOD) beneficiary upon the death of the sole owner or the last to die of multiple owners.

Section 867.046 of the Wisconsin Statutes includes non-probate transfers of property under 705.10(1) and 705.15. Note: Section 705.15 pertains to the decedent's interest in the real property that is transferred at his/her death to the grantees named on the "Transfer of Death" deed. *The beneficiary(ies) receiving the interest, or any interested person may file this form. In the event one of the named beneficiaries is pre-deceased, it is advisable to seek legal counsel to determine if or how their interest may be transferred.*

B. WHAT PROPERTY MAY BE TRANSFERRED

This form may be used for non-probate transfers on death to a designated TOD beneficiary(ies) under 705.10(1) and/or 705.15.

C. WHERE SHOULD THIS FORM BE RECORDED

Record this form with the Register of Deeds of the county in which the relevant real estate is located. If this form does not include real estate, record this form with the Register of Deeds of the county in which the decedent lived prior to death.

If the decedent had an interest in more than one parcel of real estate and the relevant real estate is located in different counties, a separate form must be filed with the Register of Deeds of each county in which the relevant real estate is located. On any form recorded with a Register of Deeds, only list the real estate located in that particular county.

D. COMPLETING THIS FORM

Complete the form **accurately and legibly**, using **BLACK INK**. Begin at the top of the form and work your way down the form. **Complete ALL areas that have this symbol ***. Do NOT complete the area titled, **Presentation of Death Certificate**. This area will be

completed by the Register of Deeds' office. The **"Name and Return Address"** field should be filled in with the person(s) who will receive the form back. Once recorded, this TOD form will serve as the new deed of record.

Also **complete the "This document drafted by" area** by printing the name of the person(s) who filled in the form. You will also be required to have your signature witnessed in the presence of a notary prior to submitting the form.

If needed, ask your attorney for help with legal questions. The Register of Deeds can provide information on recording requirements.

SUBMIT THE FOLLOWING WITH THIS FORM:

1. A **completed Wisconsin Real Estate Transfer Return** form, if an interest in real estate is being transferred. Only the green paper form (PE-500) may be used at this time.
2. A **certified copy of the death certificate** (for verification only).
3. A **copy of the document** that shows the Transfer on Death interest.
4. **The recording fee is \$25.00.** Your check for \$25.00 should be made payable to, "Register of Deeds".

Describing real estate (if any):

5. **Attach the complete and accurate legal description of each parcel of real estate. A copy of your deed will have this information** but if part of the land was sold off prior to decedent's death, it must be excluded from the legal description.
6. **Include the parcel identification number (aka tax key number). This may be found on the property tax bill. There will be a number for each tax parcel.**

Describing personal property (if any):

Identify items transferred under 705.10(1). A copy of the instrument that shows the TOD interest must also be submitted.

NOTE: If you are the person(s) receiving the interest, your signature(s) on the form *must be notarized*.