

Probate / Conservatorship Bond Application*

Applicant Contact Info

Name of Person Applying for Bond: _____

Phone: _____ Email: _____

Address: _____

City: _____ State: ____ Zip: _____

Social Security #: _____ Date of Birth: _____

Occupation: _____ How Long engaged in Occupation? _____

Applicant's Net Worth: \$ _____

1. Case # _____ Case Name on Docket: _____

2. Amount of Bond Requested: \$ _____

3. What has applicant been appointed by court as: _____
Example: Administrator, Executor, Administrator with Will Annexed, Conservator, Trustee

4. Date of Applicant's appointment: _____ If over 6 months ago, attach brief explanation.

5. Does this replace a prior bond? Yes or No

6. Has the applicant had possession of the estate assets (i.e. power of attorney, access to bank accounts, etc.) prior to their appointment? Yes or No - If Yes, attach brief explanation

7. Is the applicant indebted to the estate or trust? Yes or No - If Yes, attach brief explanation

8. Assets of estate: (describe) _____

9. Name(s) of heir(s): _____

10. Has anyone objected to the applicant's appointment as fiduciary? Yes or No

11. Will any going business of the estate be continued or operated by the fiduciary? Yes or No If yes attach a copy of court order

*By submitting this application, applicant(s) consent to and authorize the procurement and use of a credit report for the individuals and/or business listed on this application and grant expresses authorization that all information on this application will be utilized and relied upon in the issuance of any bond on or after the date of this application.

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12. Is this an additional bond for the same fiduciary matter? Yes or No
13. What is the applicant's experience in handling fiduciary responsibilities? _____
14. Name of Deceased or Ward : _____
15. Date of Death: _____
16. Applicant's relationship to Deceased or Ward: _____
17. Name and address of Court: _____
18. Name and address of Attorney: _____
19. Will the attorney remained involved throughout the duration of this estate? Yes or No
20. Requested effective date of bond? _____
21. For Conservatorship bonds:
- Address of Ward: _____
- Age of Ward: _____
- Physical / Mental condition of Ward: _____

IMPORTANT – PLEASE READ

The undersigned applicant(s) and/or indemnitor(s) understand and agree to the following, for this application to be considered:

1. This is an application for a Surety Bond. A Bond is a credit relationship. A Bond is NOT an insurance policy. You, officers, directors, principals and other Indemnitors under Bond will severally and jointly be liable for payment to the Surety of any defaults under the Bond.
2. You must answer the questions on this application accurately. Any person who knowingly and with the intent to defraud any surety company or other person files an application containing any false information or conceals, for the purpose of, misleading information concerning any fact material thereto commits a fraudulent act, which is a crime.

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3. Due to the unique nature of this bonding program, all premiums, fees and/or commissions are considered fully earned, and are not refundable even if your bond is cancelled midterm.

4. You understand, that if issued, the bond is in effect and premiums will be due, until a final discharge is signed by the judge and a copy delivered to the surety.

5. CREDIT REPORT CONSENT - The undersigned applicant(s) and/or indemnitor(s) understand and agree that by submitting an application for bonding, the undersigned authorize the Surety and/or its representatives to verify the information provided and the obtaining of additional information from any source, including obtaining a credit report on the undersigned and/or any other individuals associated with the business involved, including spouses, at the time of application, in any review or renewal, at the time of any potential or actual claim, or for any other legitimate purpose determined by the writing company in its reasonable discretion.

Signed this _____ day of _____, 20_____.

Print Applicant's Name _____ Signature _____

PLEASE ATTACH A COPY OF PETITION & ORDER

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