

Information Checklist for Probate and Guardianship Bond Submissions

(Please note that due to the various complexities of certain cases, additional information may be required.)

Administration

- Original, completed signed application
- Copy of Petition for Letters of Administration
- Copy of post card from court fixing bond limit (if applicable)
- Original attorney involvement letter (sample attached)
- Copy of the Letters of Administration once issued

Administration CTA

- Original, completed signed application
- Copy of Petition for Letters of Administration CTA
- Copy of post card from court fixing bond limit (if applicable)
- Copy of the decedent's will
- Copy of the releases, renunciations or consents of distributees
- Original attorney involvement letter (sample attached)
- Copy of the Letters of Administration CTA once issued

Executor

- Original, completed signed application
- Copy of Petition for Letters Testamentary
- Copy of post card from court fixing bond limit (if applicable)
- Copy of the decedent's will
- Original attorney involvement letter (sample attached)
- Copy of the Letters Testamentary once issued

Preliminary Executor

- Original, completed signed application
- Copy of Petition for Preliminary Letters Testamentary
- Copy of post card from court fixing bond limit (if applicable)
- Copy of the decedent's will
- Original attorney involvement letter (sample attached)
- Copy of the Preliminary Letters Testamentary once issued

Guardian of Minor for Inherited Assets

- Original, completed signed application
- Copy of signed court order of appointment
- Copy of the decedent's will if a trust is being created
- Place of deposit of assets

Guardian of Incapacitated Person

- Original, completed signed application
- Copy of the Petition for appointment
- Copy of the Court Evaluator's report
- Copy of signed court order of appointment
- Copy of IP's will when available
- Inventory of assets if not included in court order of appointment
- Original instructions to guardian letter (sample attached)
- Copy of any Trusts or other instruments relative to the Article 81 Proceeding

Veteran's Administration Custodian

- Original, completed signed application
- Copy of letter from VA appointing custodian and fixing bond penalty
- Original attorney involvement letter (sample attached)

Replacement Surety for Guardianships

- Original, completed signed application
- Copy of signed court order requiring the filing of a new bond
- Copy of original court order of appointment
- Copies of 2-3 years (most recent) approved annual accountings
- Copy of court evaluator's report (if available)
- Copy of IP's will when available
- Original instructions to guardian letter (sample attached)

Trustee of Supplemental Needs Trust

- Original, completed signed application
- Copy of court order that approves the SNT, appoints trustee and fixes bond penalty
- Copy of signed trust agreement
- Original instructions to trustee letter (sample attached)