

Probate & Fiduciary Bond Application

Type of Bond: _____ Bond No: _____
Amount: _____
Hearing Date: _____ Case No: _____
Estate Name: _____
Name: _____ Tel. #: _____
Address: _____ Mobile #: _____
City: _____ State: _____ Zip: _____ Email: _____
Social Security No. _____ Driver's License #: _____ State: _____
Your Net Worth: _____ Date of Birth: _____
Employer/Retired: _____ Position/Previous Position: _____
Address: _____ City: _____ State: _____ Zip: _____
Tel # (____) _____ Length of Employment: _____
Do you own a home? _____ Rent? _____ Other: _____
Have you ever taken possession of any of the estate's assets? _____
Has there been a prior bond filed in this estate before? _____
What is your relationship to Decedent/Conservatee/Minor: _____
What is your share of this estate (Decedent's estate only): _____
Have you had a criminal conviction? _____ Lost a civil judgment? _____
If yes, explain: _____
Have you or your spouse filed personal bankruptcy? _____ If yes, when? _____
Are you indebted to Decedent/Conservatee? _____ If yes, amount \$: _____

ESTATE INFORMATION

Name of Decedent/Conservatee/Minor: _____
Date of Birth of Conservatee/Minor: _____
Estate Cash: _____ Securities: _____ Real Property: _____
Other Assets: _____ Annual Income (All Sources) \$: _____
Bank where ESTATE ACCOUNT will be opened: _____
City: _____ State: _____ Zip Code: _____
Where will securities be kept? _____
(Safe deposit box, Brokerage – Including Name & Address)
Does estate contain an ongoing business? _____ If yes, name: _____
Type: _____ Will it be continued? _____
If yes, do you understand you must have a court order to continue business? _____

ATTORNEY INFORMATION

Attorney handling this case: _____ Law Firm: _____
Phone: _____ Fax: _____ Email: _____
Address: _____
City: _____ State: _____ Zip code: _____

Do you understand that the first year's bond premium is not refundable? _____
Do you understand all increases and reductions of the bond must be ordered by the court? _____
Do you understand the bond is in effect until a final discharge is signed by the judge and a copy delivered to the surety? _____
Do you understand the bond premium is to be paid annually? _____
Do you understand you must retain an attorney throughout the administration of this estate? _____