



PROBATE BOND APPLICATION

Applicant(s) Name in Full: Social Security #: FEIN#:

Applicant(s) Complete Address (street, city, state, and zip code):

Has Applicant(s) Ever Filed for Bankruptcy? No Yes, if so explain

Applicant(s) Current or Prior Occupation:

Relationship of Applicant(s) to Deceased or Ward:

Effective Date: Bond Amount\$:

Bond Type: Temporary Permanent Successor Additional Co: Administrator
Executor Guardian Minor- Adult-
Trustee Conservator-Adult Sale of Real Estate Other:

Reason for the Guardianship or Conservatorship?

Court and County Where Bond will be Filed:

Docket Number: Number of Heirs:

Name of Deceased, Ward, or Title of Case:

Which is Applicable: Date of Death – Date: Date of Birth of Ward – Date:

Estate Assets Breakdown Cash, Stocks, Personal Property \$: Estate Assets Breakdown Real Estate \$:

Estate Liabilities Breakdown (Mortgage, Credit Card, etc.)\$

Attorney Name and Firm Name:

Attorney Address:

Attorney Telephone Number: Attorney Email Address:

*Is the applicant(s) a U.S. Citizen? Yes No

Please provide a complete copy of all court documents and details regarding any "yes" answer:

*Has any applicant(s) ever been convicted of a felony or crime involving dishonesty, including theft or fraud? Yes No

*Has any applicant(s) ever had a bond claim filed or paid against them? Yes No

*Does any applicant(s) have any suits, liens or judgments filed against them? Yes No

*Has the requested bond been declined by another Surety Company? Yes No

*Is the estate involved or potentially involved in any litigation? Yes No

*Has any applicant(s) had prior custody of assets? {check all that apply}

 No Yes, held assets Yes, to handle sale of real estate Yes, to handle daily financial Matters
 Yes, durable power of attorney Yes, to help with daily financial matters

*Is there an ongoing business in the estate? Yes No

*Is any applicant(s) indebted to the estate? Yes No

*Does the estate include debts owed to the applicant(s)? Yes No

*Is any applicant(s) a successor fiduciary? Yes No

*Is there any dissention among the heirs or beneficiaries? Yes No

*Is the bond required due to the demand of an heir or creditor? Yes No

*Is there a will or trust? Yes, if yes please provide a copy No

*Will the attorney remain involved in the estate until the bond is discharged by the court? Yes No

*Will the court require an annual accounting? Yes No

*Will the court require a bi-annual accounting? Yes No

Do you understand the bond will remain in effect and a renewal premium will be due until the bond is properly discharged by the court? Yes No

Note:

- ❖ **First year's premium is fully earned and any quote provided will be valid for 30 days for the date indicated on the quote, unless specified otherwise.**
- ❖ **This quote is only valid based on the information originally provided in the submission.**
- ❖ **Any undisclosed information found after the approval would void said approval.**
- ❖ **If newly undisclosed information is obtained, please forward it to the underwriter for updated approval terms.**