



Probate & Fiduciary Bond Application

Applying for a bond is like applying for credit, therefore, please make sure this information is complete and legible.

Type of Bond: County/State: Case #: Amount: \$
Agent's Name & Contact: Tel. #: Email:
Agent's Address: City: State:
Does the agent have experience with applicant/lawyer's work and can recommend?

Applicant Information

Name: Tel. #:
Address: Mobile #:
City: State: Zip: Email:
Social Security #: Driver's License #: State:
Annual Income: Net Worth: Date of Birth:
Do you own a home? Rent? Other:
Employer/Retired: Position/Previous Position: Length of Employment:
Employer Address: City: State:
Have taken possession of the estate's assets? Has there been a prior bond filed in this estate before?
Relationship to the Decedent/Conservatee/Minor? Share of the estate (Decedent's estates only)?
Have you had a criminal conviction? Lost a civil judgement?
If yes, explain:
Have you or your spouse filed a personal bankruptcy? If yes, when?
Are you indebted to the 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:
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 the case: State Bar #:
Law Firm: Tel. #: Fax #: Email:
Address:
City: State: Zip:
Do you understand the first year's bond premium is not refundable?
Do you understand all increases and reduction 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?

