

PROBATE BOND APPLICATION

INSTRUCTIONS

Option 1 — Email or Fax

Complete all pages of the application.

✉ Email completed application to:
probateapp@bondservices.com

— OR —

📠 Fax to:
619-231-9545

Option 2 — Online

Apply for your probate bond online at:

🌐 www.bondservices.com/probate-bond-application

Probate Bonds Include

- Executors
- Administrators
- Guardianships
- Trusts
- Conservatorships
- And More

NEED HELP?

Call us between the hours of 9am–4pm PST

San Diego

Phone: (619) 231-9522
Fax: (619) 231-9545
sandiego@bondservices.com

Orange County

Phone: (888) 558-3007
Fax: (877) 558-8297
orangecounty@bondservices.com

Los Angeles

Phone: (213) 628-2970
Fax: (213) 628-2977
losangeles@bondservices.com

Inland Empire

Phone: (909) 890-1409
Fax: (909) 890-4282
sanbernardino@bondservices.com

San Jose

Phone: (408) 998-5056
Fax: (408) 279-3160
sanjose@bondservices.com

Bay Area / Concord

Phone: (925) 370-2330
Fax: (925) 370-2339
norcal@bondservices.com

Sacramento

Phone: (916) 424-0435
Fax: (916) 424-0437
sacramento@bondservices.com

Texas

Phone: (817) 509-1511
Fax: (817) 796-2637
info@southwestbonding.com

Arizona

Phone: (623) 362-0601
Fax: (623) 362-2218
az@bondservices.com



PROBATE BOND APPLICATION

If any info in this first section is unknown, leave blank.

Type of Bond _____ Amount _____

Hearing Date _____ Court / County _____ Case No _____

Estate Name _____

Personal Information

Name _____

Address _____

City _____ State _____ Zip Code _____

Phone # _____ Mobile # _____ Email _____

Social Security # _____ Drivers License # _____ State _____

Your Net Worth _____ Annual Income _____ Date of Birth _____

Employer / Retired _____ Position (If retired, previous position) _____

If Self Employed, Nature of Business _____ Length of Employment _____

Address _____

City _____ State _____ Zip Code _____ Phone # _____

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 judgement? _____

If yes to either of two above, explain _____

Have you or your spouse filed personal bankruptcy? _____ If Yes, when? _____

Are you indebted to Decedent/Conservatee? _____ If Yes, amount? _____

Estate Info

Name of Decedent/Conservatee/Minor _____ Date of Birth _____

Estate Cash \$ _____ Securities \$ _____ Real Property \$ _____

Other Assets \$ _____ Annual Income (All Sources) \$ _____

FDIC Insured Bank (where ESTATE ACCOUNT will be opened) _____

City _____ State _____ Zip Code _____

Where will securities be kept? (Name of safe deposit box or brokerage) _____

Address _____

City _____ State _____ Zip Code _____

Does estate contain an ongoing business? _____ If Yes, Business Name _____

Type of Business _____ Will the business be continued? _____

If Yes, do you understand you must have a court order to continue business? _____

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PROBATE BOND APPLICATION

Attorney Info

Law Firm _____

Name of Your Attorney _____

Email _____ **Phone** _____ **Fax** _____

Address _____

City _____ **State** _____ **Zip Code** _____

Agreements

Please answer in the affirmative, "Yes", to confirm that you understand and agree.

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? _____

IN THE SUPERIOR COURT OF THE STATE OF CALIFORNIA
IN AND FOR COUNTY OF _____

IN THE MATTER OF

BOND NO. _____

Case Number

All Papers and notices may be served at

Bond Upon Qualifying **Additional Bond**

Premium: Per Annum

KNOWN ALL MEN BY THESE PRESENTS:

That we, _____ as Principal,
and the _____ as Surety, are held and
firmly bound unto _____
in the sum of _____ dollars (\$ _____)
for which payment, well and truly be made, we bind ourselves, our heirs, executors, successors, and assigns jointly and severally, firmly
by these presents.

THE CONDITION OF THE ABOVE OBLIGATION IS SUCH THAT,

WHEREAS, an order was duly made and entered by the Superior Court of the State of California, for the County of
_____ on _____.

Appointing the above Principal _____ of the estate of
_____ and directing that letters be issued upon
executing a bond according to law in the sum above named.

Directing the said Principal to execute an additional bond according to law in the sum above named.

NOW, THEREFORE, if the said Principal shall faithfully execute the duties of the trust according to law, then this obligation
shall be void, otherwise to remain in full force and effect.

Signed and dated at _____ California on _____
(Place) (Date)

(Principal)

(Principal)

IN WITNESS WHEREOF, The corporate seal and name of said Surety Company is hereto affixed and attested by
_____, who declares under penalty of perjury that he is duly authorized Attorney-in-
Fact acting under an unrevoked power of attorney on file with the Clerk of the County in which above entitled Court is located.

By: _____
Attorney-in-Fact