

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

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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 _____ 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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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? _____



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Indemnity Agreement

INDEMNITORS ACKNOWLEDGE AND AGREE THAT: **THE FIRST YEAR PREMIUM IS FULLY-EARNED WHEN THE BOND IS ISSUED EVEN IF THE BOND IS SUBSEQUENTLY REDUCED OR TERMINATED DURING THE FIRST YEAR.** IF A BOND IS REDUCED OR TERMINATED DURING THE SECOND OR SUBSEQUENT YEAR AFTER A RENEWAL PREMIUM IS PAID, THE RENEWAL PREMIUM SHALL BE ADJUSTED PRO RATA UPON REDUCTION OR TERMINATION.

The Indemnitors represent that all statements made in this Application and in any Application Supplement are true and made without reservation to induce the Surety and its successors, assigns, co-sureties and reinsurers, severally not jointly, and/or for which surety business is underwritten by the Surety to extend surety credit in any manner, included but not limited to providing or having provided requested Bond(s).

Indemnitors hereby agree as follows:

- (1) to pay all premiums when due;
- (2) to deliver evidence satisfactory to Surety, of the release of all liability;
- (3) to exonerate and Indemnify Surety from and against all claims, losses, liability damages of any type (including punitive damages), costs, fees, expenses, suits, orders, judgments, or adjudications whatsoever which Surety may incur in connection with the extension of surety credit, including the enforcement of the agreements contained herein (collectively "LOSS");
- (4) that Surety shall have the right, at its sole discretion, to pay, adjust, settle or compromise any LOSS and the voucher or other evidence of such payment, settlement or compromise, whether Surety was liable therefore or not, shall be prima facie evidence of the Indemnitors' liability;
- (5) to pay the Surety immediately upon demand, in the amount Surety deems necessary to protect the Surety from any LOSS or potential LOSS, whether or not Surety has made payment or posted a reserve, Surety having the right to use all or part of these funds in payment or settlement of any LOSS or in reimbursement to Surety for payment of same;
- (6) that Indemnitors hereby authorize Surety to investigate statements made herein and to check credit with creditors, credit reporting agencies and/or lending institutions, and further authorize any present or former employer, or any other person, firm or corporation, to furnish information concerning Indemnitors in connection with the Surety's extension of surety credit and with Indemnitors' compliance with obligations hereunder and under any bond or underlying obligation, and Indemnitors hereby release any of the aforementioned from liability in consequence of furnishing or disclosing such information;
- (7) that Surety may bring separate suits to recover hereunder as causes of action shall accrue and that the bringing of suit or recovery of judgment upon any cause of action shall not prejudice or bar the bringing of other suits upon other causes of action, whether heretofore or thereafter arising;
- (8) that any and all other rights which Surety may have or acquire against Indemnitors under other or additional agreements (along with this Agreement collectively "INDEMNITY") related to the extension of surety credit, shall be in addition to and not in lieu of the rights afforded Surety under this Agreement;
- (9) that if Surety executes any Bond(s) with any co-surety or reinsures all or any part of Bond(s), that all the terms of this agreement shall apply and operate for the benefit of such co-surety and reinsurer, as their interest may appear;
- (10) that these covenants shall be jointly and severally binding upon Indemnitors, their respective heirs, executors, administrators, successors and assigns;
- (11) that Surety shall have the right to decline to issue or to cancel Bond(s) at any time, free of claim for loss or damage by Indemnitors, and Surety shall be under no obligation to disclose its reasons therefore, the provision of any law to the contrary being hereby waived;
- (12) that the exercise, delay of or failure by Surety to exercise any right, remedy or power whatsoever shall not preclude Surety's simultaneous or subsequent exercise or constitute any waiver of such or other rights, remedies or power;
- (13) if any Bond(s) relate(s) to the assets of an estate, Indemnitors will provide reasonable access to all records concerning the estate and upon request shall provide a written report of the condition of the estate.

Furthermore, Indemnitors grant, assign, pledge and convey to Surety as security, a lien against and a security interest in and to Indemnitors' interest, title and rights in the proceeds of any insurance policy affording coverage for all or part of any bonded obligation, and in contracts or obligations (and all proceeds thereof without limitation) that grow in any manner whatsoever as a result of the extension of the Surety credit. While the lien and security interest are effective immediately, Surety may exercise its remedies with respect to such, only in the event:

- a) Indemnitors' failure to fulfill any obligation whatsoever for which i) bond(s) are provided; ii) contained in any bond(s); iii) contained within any INDEMNITY agreement with the surety; and b) any assignment by Indemnitors for the benefit of creditors or any agreement or proceeding of liquidation, receivership or bankruptcy whatsoever. Indemnitors hereby authorize Surety to file any such financing statement, as Surety deems necessary or appropriate to perfect the liens and security interest granted herein.

Any person who knowingly and with intent to defraud any insurance company or other person, files an application for a surety bond containing false information, or conceals for the purpose of misleading information concerning any fact material thereto, commits a fraudulent insurance act which may subject such person to criminal and/or civil penalties.

Date Signed Day _____ Month _____ Year _____

Indemnitor Name _____

Indemnitor Signature X _____

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

BOND NO. _____

IN THE MATTER OF

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