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Conservator/Guardian of a Minor Underwriting Review Sheet

✓ Please provide us with a copy of the Petition

Bond Information

Bond Type: Conservator/Guardian of a Minor
Bond Amount: _____
Probate Court (County): _____

Conservator/Guardian Information

Name: _____
Home Address: _____
Relationship to Minor: _____
Social Security Number: _____
Date of Birth: _____
Do you own a home? Yes No
Original Cost: _____
Employer/Position: _____
Spouse's Name: _____
Spouse's Date of Birth: _____
Natural Parent? Yes No
 Married Single Divorced
Estimated Net Worth: _____
Date Purchased: _____
Present Value: _____
How long have you been employed? _____
Spouse's SSN: _____
Spouse's Employer/Position: _____

Attorney: _____
Attorney Address: _____
Attorney Phone: _____
Firm Name: _____
Attorney E-mail: _____

Minor Information

Full Name of Minor: _____
Date of Birth: _____
With whom does the Minor live? _____
Social Security Number: _____

What is the source of the conservator/Guardian funds? _____
Where will the funds be kept? _____
Will the funds be used to support the Minor? Yes No
Is this a structured settlement? Yes No
Is there any current litigation? Yes No

Attorney Representing Insurance Company: _____
Firm Name: _____
Attorney Contact Information: _____

Please list two next of kin to the Conservator/Guardian

Name: _____ Relation: _____
Address/Phone: _____
Name: _____ Relation: _____
Address/Phone: _____

Contact Information

Home Phone: _____ Cell Phone: _____
Work Phone: _____ Fax Number: _____
E-mail Address: _____

I understand that as a part of the underwriting process a credit report will be order on the Conservator/Guardian and spouse (if married). I agree and accept this as part of the underwriting information sheet that has been completed by the Conservator/Guardian, my counselor or surety, for the surety for consideration of my bond request.

X _____ Date: _____
Conservator/Guardian Signature