

o Administratrix o Administrator o Executor o Executrix Information Sheet

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Mt. Juliet, TN 37122

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✓ Please provide us with a copy of the Petition

Bond Information

Bond Type: _____

Bond Amount: _____ Case Number _____

Probate Court (County): _____ Hearing Date _____

Administrator/ Executor Information

Name: _____ Email _____

Home Address: _____

Social Security Number: _____ Date of Birth: _____

Home Phone: _____ Cell Phone: _____

Relationship to Decedent: _____ Married Single Divorced

Estimated Net Worth: _____ Do you own a home? Yes No

Employer/Position: _____ How long have you been employed? _____

Attorney: _____ Firm Name: _____

Attorney Address: _____

Attorney Phone: _____ Attorney E-mail: _____

Deceased Information

Full Name of Deceased: _____

Date of Death: _____ Cause of Death: _____

Estate Information

Estate Cash: _____ Securities: _____ Real Property: _____ Misc Assets: _____

Bank Where Estate Account will be open: _____

City: _____ State: _____ Zip Code _____

Has a bond been filed for this Estate before? Yes No

Is there any current litigation? Yes No Are you indebted to the Estate? Yes No

Is there an ongoing business? Yes No Is there a will? Yes No (Please provide a copy)

Will the attorney remain involved throughout the duration of this estate? Yes No

Will professional accounting, investment or legal services be provided on an ongoing basis? Yes No

Do you understand that the first year's premium is fully earned and not refundable? Yes No

Do you understand that increase or reductions in bond amount must be court approved? Yes No

Do you understand that the premium is due annually and continues until the bond is released? Yes No

Do you understand the bond is in effect until a final discharged is signed by the judge and Yes No

delivered to the Surety? ****If answer is YES please provide a full explanation on a separate document.**

Is bond required on the demand of an interested Party? Yes No

Does this bond replace that of another bonding company? Yes No

Does Applicant replace a prior Fiduciary? Yes No

Please list all Heirs at Law, Devisees, Legatees or Distributees

Name	Age	Relation to Deceased	Address	Phone
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I understand that as a part of the underwriting process a credit report will be order on the Administrator/ Executor and spouse (if married). I agree and accept this as part of the underwriting information sheet that has been completed by the Administrator/ Executor, my counselor or surety, to the surety for consideration of my bond request.

X _____
Administrator/ Executor Signature

Date: _____