



BOND CONSULTANTS INC

JW Bond Consultants, Inc.
6023A Kellers Church Road
Pipersville, PA 18947

PROBATE BOND APPLICATION\*

Date: \_\_\_\_\_

1. AGENT/BROKER INFORMATION
Agency/Broker Name: JW Bond Consultants, Inc.
Producer #: #19334
Phone #: 215-766-1990
Fax #: 215-766-1225

2. CASE INFORMATION
Type of Bond (Attach Bond Form):
Amount of Bond:
Amount of Estate:
Effective Date:

In the matter of the Estate of:
Is there a will?
Yes No

Who is: Deceased Minor Incompetent
Date of Death:
Date of Birth:
Date declared Incompetent:
E-Mail:

Bond Filed in: Court County, State of:
Date of Appointment:
Probable Duration of Trust:

Is Principal: Sole or Principal beneficiary of estate?
If Yes to any answers, please provide responses on a separate sheet.

Controls imposed on estate assets:
Has Court approved support allowance for family or wards?
Blocked Accounts?
Other Safeguards?

3 PERSONAL INFORMATION
Individual's Name:
Relationship To Ward:
Social Security #:
Date of Birth:

Occupation:
Employer and Business Address:
Business Phone:

Spouse's Name:
Social Security #:
Date of Birth:

Residence Address:
City:
State:
Zip Code:
Residence Phone:

Are You the Trustee, Trustor or Beneficiary of any Trust?
Ever Declared Bankruptcy?
Pending or Prior IRS Liens?
Any Lawsuits Pending Against You?
Ever Failed in Business?

Estimated Personal Net Worth: \$
If bond penalty exceeds \$250,000, submit personal financial statements. No tax returns, please.

4. List estimated estate assets:

- a. Cash:
b. Stocks/Bonds:
c. Personal Property:
d. Real Property:
e. Estimated Estate Debts:

5. Persons interested in the estate. List all heirs, legatees, beneficiaries, wards, etc...

Name Age Relationship Address

6. Has another bonding company declined this bond?
7. Are you replacing a prior fiduciary?
8. Does this bond replace another bond?
9. Is there an on-going business in the Estate?
10. Are you indebted to the Estate?
11. Have you had prior custody of assets in any capacity?
12. Will Joint Control be exercised?
13. Attorney Information:
a. Attorney Name:
b. Firm Name:
c. Address:
d. Attorney Phone/Fax:
e. How long has the attorney known the Applicant?

\*All information furnished on this application will be utilized and relied upon for the issuance of any bonds on or after the date above.