

FIDUCIARY BOND

Request for: Issue Bond Bond Preapproval (No Cost)

- Conservator Guardian
 Trustee Personal Representative

Bond Requested from:

Court Bonds

5727 SW Macadam / P.O. Box 69508
Portland, OR 97239

Contact: Jenny Tuomi, CIC jtuomi@jdfulwiler.com
(503) 977-5624 (800)632-6878
fax (503)245-9188

Please read before submitting this form: Signature at the bottom of this form grants permission for Court Bonds to generate a CREDIT REPORT which will be used for bond underwriting purposes. A request for Bond Preapproval has no cost. A request to Issue Bond will result in a premium charge.

ATTORNEY of RECORD FOR APPLICANT & BOND INFORMATION:

BOND AMOUNT: \$ _____	COUNTY: _____	Case #: _____
Firm: _____	Attorney Name: _____	
Address: _____	Attorney Email: _____	
City / State / Zip: _____	Legal Assistant Name: _____	
Phone: _____	Assistant Email: _____	

APPLICANT INFORMATION:

Name: _____	Relationship to Protected Person or Decedent: _____
Address: _____	Occupation: _____
City, State, Zip: _____	Annual Income: _____ Net Worth: _____
Phone: _____	Check Box if Income & Net Worth are joint with Spouse
Email Address: _____	Date of Birth: _____ Marital Status: _____
	Social Security # (Required) _____

PROTECTED or INCAPACITATED PERSON INFORMATION:

Respondent Name: _____
Address: _____
City / State / Zip: _____
Date of Birth: _____
Cause for Protective Proceeding: _____

ESTATE INFORMATION:

Name of Decedent: _____
Date of Death: _____
Is there a Will? Yes No
Who are the Heirs/Devisees?: _____

ASSETS OF THE PROTECTED PERSON OR THE ESTATE:

Real Property: \$ _____	Real Property Restricted? Yes No	Income: \$ _____
Cash / Accounts: \$ _____	Personal Property \$ _____	Other (explain): \$ _____

GENERAL INFORMATION & SIGNATURE (Required – Please respond to all questions below, date, & sign):

Yes No

- Has there ever been a prior bond in this case?
Is the applicant a debtor or creditor to the estate?
Is there a business of any kind involved in this case?

Yes No

- Any assets resulting from insurance claim?
Has the applicant ever been convicted of a felony?
Has the applicant ever filed bankruptcy?

I understand it is a requirement of bonding that I must maintain attorney representation for the duration of this case as long as a bond is required. I also understand the first year premium is owing within Court Bonds' terms and fully earned even if the bond stays in place for less than 12 months. I have read, reviewed, and understand all of the above. All information provided is true and accurate. YES (This box must be marked for a bond to be issued)

APPLICANT INK SIGNATURE: _____

DATE: _____

PRINT NAME: _____