

New Probate Bond Request Form

CBS AGENCY, INC.

(a Subsidiary of the Columbus Bar Association)

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CASE NAME: _____

CASE NUMBER: _____

COUNTY: _____

☐ ESTATE or ☐ TRUST or ☐ GUARDIANSHIP

ESTATE: DATE OF DEATH: _____

GUARDIANSHIP: MINOR: ☐ DOB: _____
INCOMPETENT: ☐ DOB: _____
HEALTH STATUS: _____

Has Applicant Filed Bankruptcy in the past 7 years? Yes ☐ No ☐

Is this an Additional Bond Request? (If Yes, please use this [form](#).) Yes ☐ No ☐

Is there a prior surety or has a previous bond been filed in this estate? Yes ☐ No ☐

Estate: Has this previously been bonded as a Guardianship? Yes ☐ No ☐

Do all interested parties agree with appointment of applicant? Yes ☐ No ☐

Guardianship: Are funds to be used for care and support? Yes ☐ No ☐

Guardianship: What is source of funds? _____

Is bond required on demand of anyone (other than Court)? Yes ☐ No ☐

Who: _____

ATTORNEY: _____

ADDRESS: _____

Phone: _____

Email: _____

FIDUCIARY: _____

ADDRESS: _____

*SSN: _____

**Email: _____

Relationship to :
deceased/ward _____

BILLING CONTACTS: Attorney Fiduciary

Initial Invoice (email): ☐ OR ☐

Renewal Invoice (mail): ☐ OR ☐

ASSETS of ESTATE, GUARDIANSHIP, TRUST:

Personal Property \$ _____

Real Estate \$ _____

Other: (describe) \$ _____

Total \$ _____

AMOUNT OF BOND REQUESTED \$ _____

SURETY COMPANY:

APPROVED: ☐

DECLINED: ☐

PRE-AUTHORIZED BOND AMOUNT:

BY:

Date:

Cathy Victor, Attorney-in-Fact

Nicole Adolph, Attorney-in-Fact
John Susie, Attorney-in-Fact

BOND No.:

*The applicant agrees that the surety company may use the fiduciary's social security number to obtain and review a credit report.

**The applicant consents that the Surety may electronically deliver any documents relating to their bond(s) including, but not limited to, bond, invoice, endorsement, renewal, and cancellation documentation relating to the bond(s).

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