

# 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** \$ \_\_\_\_\_

<b>SURETY COMPANY:</b> _____		<b>APPROVED:</b> <input type="checkbox"/>	<b>DECLINED:</b> <input type="checkbox"/>
<b>PRE-AUTHORIZED BOND AMOUNT:</b>			
<b>BY:</b>		<b>Date:</b>	
Cathy Victor, Attorney-in-Fact	Nicole Adolph, Attorney-in-Fact John Susie, Attorney-in-Fact	<b>BOND No.:</b>	

\*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).