FIDUCIARY BOND APPLICATION

(ADMINISTRATOR/EXECUTOR/GUARDIAN/COURT)

APPLICANT(S) INFORMATION

Name of Applicant:	Date of Birth:	Estimated Net Worth $
Residence Address:		Occupation or Position:
Name of Co-Applicant:	Date of Birth:	Estimated Net Worth $
Residence Address:		Occupation or Position:
Name of Co-Applicant:	Date of Birth:	Estimated Net Worth $
Residence Address:		Occupation or Position:
Character of Bond (Attach copy of Bond):		Bond Penalty or Amount Involved: $
Name and Address of Solicitor:		
Court in which Filed:		
Title of Case or Estate:		
Name of Decedent or Ward (s):	Address:	
		(Give latest residence address of deceased or ward.)
Date of Death or Age of Ward (s):		

ESTATE ASSETS		ESTATE DEBTS
Personal: $	Real Estate: $	$

	Check Appropriate Box YES	NO	
Did Decedent leave a Will?	☐	☐	If yes, attach a copy
Is a Trust Created by Will?	☐	☐	If yes, consult Branch office
Does Applicant replace a prior Fiduciary?	☐	☐	If yes, consult Branch office
Does Bond replace a prior Bond?	☐	☐	If yes, consult Branch office
Is there a going business in the Estate?	☐	☐	If yes, Advise Proposed Disposition:
Is this an additional Bond?	☐	☐	If yes, prior Surety is:
Is Applicant related to Decedent or Ward?	☐	☐	If yes, how and what is Applicant's share of Estate?
Is Applicant Receiver or Trustee of an Insolvent?	☐	☐	If yes, will they Reorganize or Liquidate?
Will Joint Control be Exercised?	☐	☐	If yes, by whom?
Is Applicant indebted to the Estate?	☐	☐	If yes, consult Branch office
	☐	☐	

Names of Heirs or Beneficiaries	Age (s)	Address (es)	Relation to Deceased

(Attach separate list if necessary)

COMPLETE THIS BLOCK FOR PLAINTIFF, DEFENDANT'S COURT OR MISCELLANEOUS JUDICIAL BOND

STATE BRIEFLY THE FACTS AND FIGURES NECESSARY FOR COMPLETE UNDERSTANDING OF THE LITIGATION, THE COVERAGE OF THE BOND, AND THE ESTIMATED RISK.

_____

_____

Collateral: YES ☐ NO ☐

THE APPLICANT IS TO SIGN THE OTHER SIDE OF THIS FORM FOR ALL DEFENDANTS BONDS AND FOR PLAINTIFFS WITH OPEN PENALTY OR PENALTY OF $25,000 OR MORE

PERSONAL FINANCIAL STATEMENT

Name of Individual: _____
(print or type)

Home Address: _____

Date of Birth: _____ / _____ / _____ **Drivers Licence No.** _____ **SIN** _____
dd mm yy

In Reference to A: Bond Number: _____

OR B: Bond Facility for: _____

PERSONAL ASSETS		**PERSONAL LIABILITIES**	
Cash	$	Due to Banks	$
Shares, Investments, etc.	$	Personal Income Tax Due	$
Accounts Receivable	$	Other Taxes Payable	$
Personal Real Estate	$	Accounts Payable	$
Other Personal Assets 1.	$	Due Against Real Estate	$
2.	$	Debt on Other Assets 1.	$
3.	$	2. 3.	$ $
TOTAL PERSONAL ASSETS	$	TOTAL PERSONAL LIABILITIES	$

A. Gross Income from all business activities: $ _____

B. Gross Income from all other sources: $ _____

C. Have you ever failed in business, or compromised with creditors? Yes ☐ No ☐

If Yes, please explain: _____

D. Lines of Business in which you are engaged: _____

E. Do you have a personal line of bank credit established? Yes ☐ No ☐ If Yes, Amount: $ _____

F. Are you now, or do you plan to assume contingent liability such as endorser, indemnitor, guarantor, personal Surety for an in dividual, individuals or corporations, partnerships or co-partnerships? Yes ☐ No ☐

If Yes, please explain: _____

_____

_____

Amount of liability assumed: $ _____ Date liability assumed: _____

estatesure

Please Provide Details of Personal Assets and Liabilities

NAME & ADDRESS OF FINANCIAL INSTITUTION	AMOUNT ON DEPOSIT	AS AT DATE	IN WHOSE NAME
	$		
	$		

LOANS FROM BANKS AND OTHER FINANCIAL INSTITUTIONS

NAME & ADDRESS OF FINANCIAL INSTITUTION	AMOUNT OWED	AS AT DATE	IN WHOSE NAME	DUE DATE OF BANK DEBT
	$			
	$			

SHARES/INVESTMENTS:

NAME OF SECURITY	NO. OF SHARES	PAR VALUE	MARKET VALUE	REGISTERED IN NAME OF	PLEDGED?
		$	$		Yes ☐ No ☐
		$	$		Yes ☐ No ☐
		$	$		Yes ☐ No ☐

ACCOUNTS RECEIVABLE

DESCRIPTION	DUE FROM WHOM	AMOUNT	DUE DATE
		$	
		$	

PAYABLE

DESCRIPTION	TO WHOM PAYABLE	AMOUNT	DUE DATE
		$	
		$	

PERSONAL REAL ESTATE HOLDINGS:

LOCATION & DESCRIPTION OF PROPERTY(IES)	TITLE IN NAME OF	MARKET VALUE	MORTGAGE DEBTS	DATE DUE	MONTHLY PAYMENTS
		$	$		$
		$	$		$
		$	$		$

OTHER PERSONAL ASSETS AND LIABILITIES

ASSETS		LIABILITIES	
DESCRIPTION	AMOUNT	DESCRIPTION	AMOUNT
	$		$
	$		$