Probate Bond Questionnaire

Fill in what you know — leave blanks for anything you're unsure of. An agent will gladly help with the rest.

Your Contact Info

Coverages you want quoted

☐ Auto ☐ Homeowners ☐ Renters ☐ Condo / Townhome (HO-6) ☐ Landlord / Rental Dwelling ☐ Mobile / Manufactured Home
☐ Personal Umbrella ☐ Motorcycle ☐ Boat & Watercraft ☐ RV / Motorhome / Travel Trailer ☐ ATV / UTV / Golf Cart
☐ Collector / Classic Car ☐ Jewelry & Valuables ☐ Life Insurance ☑ Probate Bond

Full Name

Date of Birth

Preferred Office

Email

Phone

Best Time to Reach You

Options: Morning · Midday · Afternoon · Evening · Any time

Marital Status

Options: Single · Married · Domestic partner · Widowed · Divorced · Separated

Occupation / Employer

Spouse / Co-Applicant Name (if any)

Spouse / Co-Applicant Date of Birth

Spouse / Co-Applicant Phone

Your Address

Home Street Address

City

State

ZIP

County

Do You Own or Rent Your Home?

Options: Own · Rent · Live with family · Other

Mailing Address (if different)

Years at This Address

Current Insurance

Bundling often saves money. Tell us who insures your auto and home today, even if you only want one of the coverages below quoted.

Current Auto Insurance Company

Current Home / Renters Insurance Company

Date You Want Coverage to Start

Current Policy Expiration (if any)

Has any insurance company cancelled, refused or non-renewed a policy for anyone in your household in the past 5 years? ☐ **Yes** ☐ **No**

If yes, please explain

Claims (past 5 years)

Any insurance claims or losses in the past 5 years for anyone in your household? ☐ **Yes** ☐ **No**

#	Date	Type of Claim	What Happened	Amount Paid
1				
2				
3				

Type of Claim: Home / Property / Auto / Water damage / Theft / Liability / Weather / Hail / Wind / Flood / Other

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Probate Bond — The Bond the Court Requires

A probate (fiduciary) bond guarantees the court that you will handle an estate or a ward's money honestly. The court sets the amount; you can leave anything you don't know blank.

Your Role (Type of Bond)

Options: Executor (there is a will) · Administrator (no will) · Administrator CTA (will, no executor serving) · Guardian of a minor · Guardian of an adult · Conservator · Trustee · Other

New or Existing Bond?

Options: New bond · Increase / additional bond · Successor fiduciary · Replacing another surety

Bond Amount Required by the Court

Date the Bond Is Needed / Hearing Date

Court (e.g. Clerk of Superior Court, Estates)

County

State

Options: NC · SC · GA · TN · WV · Other

Estate / Case File Number (if assigned)

Do You Have the Court Order or Paperwork Showing the Bond Amount?

Options: Yes, I can upload or send it · Not yet · Not sure

Probate Bond — The Estate or Ward

Name of the Deceased or Ward

Your Relationship to Them

Date of Death (estates)

Ward's Date of Birth (guardianships)

Reason for Guardianship (minor, incapacity, etc.)

Last Home Address of the Deceased / Ward

Is there a will?	☐ Yes	☐ No
Does the will say the executor may serve "without bond"?	☐ Yes	☐ No
Is a trust involved?	☐ Yes	☐ No

Number of Heirs / Beneficiaries

Heirs (no will) or people named in the will. For guardianships, list the ward's closest relatives.

#	Name	Relationship to Deceased / Ward	Adult or Minor	City, State
1				
2				
3				
4				

Adult or Minor: Adult / Minor (under 18)

Is there any disagreement among the heirs or beneficiaries?	☐ Yes	☐ No	If yes, please explain
Is the bond required because an heir or creditor asked the court for one?	☐ Yes	☐ No	If yes, please explain
Does the estate include a business that will keep operating?	☐ Yes	☐ No	If yes, please explain
Is there anything that could keep the estate from being settled within 2 years?	☐ Yes	☐ No	If yes, please explain

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Probate Bond — Estimated Value

Estimates are fine. The surety looks at the property you will control.

Cash & Bank Accounts

Stocks, Bonds & Investments

Vehicles & Other Personal Property

Real Estate Value

Will Real Estate Be Sold by the Estate?

Options: Yes · No · Not sure · No real estate

Annual Income / Rents (incl. ward's income)

Known Debts Owed by the Estate

Bank Where the Estate / Guardianship Account Will Be

Willing to Use a Restricted (Court-Supervised) Account if Required?

Options: Yes · No · Not sure

Probate Bond — About You (the Fiduciary)

The surety company reviews the fiduciary's credit and background, and you (and possibly your spouse) sign an indemnity agreement. Your Social Security number is needed for that credit review. It goes only into the worksheet PDF emailed to our agency. It is never included in the email text.

Employer & Position (or "Retired from…")

Years There

Do You Own or Rent Your Home?

Options: Own · Rent · Other

Estimated Net Worth

Options: Under $50,000 · $50,000–$100,000 · $100,000–$250,000 · $250,000–$500,000 · $500,000–$1 million · Over $1 million · Prefer to discuss

Experience Handling Estates, Finances or Fiduciary Duties

Your Social Security Number

Have you ever filed for bankruptcy, personally or for a business you owned?	☐ Yes	☐ No	If yes, please explain
Have you ever been convicted of a crime other than a minor traffic violation?	☐ Yes	☐ No	If yes, please explain
Has there ever been a claim on any bond issued for you?	☐ Yes	☐ No	If yes, please explain
Has a surety company ever declined a bond for you?	☐ Yes	☐ No	If yes, please explain
Any known credit concerns (collections, judgments, tax liens)?	☐ Yes	☐ No	If yes, please explain
Do you owe money to the deceased, the ward, or the estate?	☐ Yes	☐ No	If yes, please explain
Have you already had control of any estate or ward assets?	☐ Yes	☐ No	If yes, please explain
Will anyone serve with you as co-executor / co-fiduciary?	☐ Yes	☐ No	

The surety also needs each co-fiduciary's Social Security number for the credit review (sent securely to our agency only).

#	Name	Relationship	Phone	Social Security #
1				
2				

Was there a previous fiduciary or bond on this estate?	☐ Yes	☐ No	Who, which surety, and why the change?

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Probate Bond — Attorney

Most sureties, including The Cincinnati Insurance Companies, require an attorney to handle the estate or guardianship for as long as the bond is in force.

Do You Have an Attorney for This Estate?

Options: Yes · Not yet · No

Attorney Name

Law Firm

Attorney Phone

Attorney Email

Law Firm Address

Notes & Authorization

Additional Notes or Questions for Your Agent

Helpful to include: current declarations pages, appraisals for valuables, and (for probate bonds) the court order showing the bond amount. Please do NOT write bank account or payment card numbers on this form. Social Security numbers belong only in the Probate Bond boxes.

DISCLAIMER: This worksheet is for quotation purposes only and does not bind coverage. By signing, you authorize Maxwell B. Hamrick Insurance Agency, Inc. and the insurance companies and surety companies it represents to obtain claims history, motor vehicle reports, insurance scores and (for bonds) credit information as needed to prepare accurate quotes.

Signature (type full name)

Date

Return completed form to state@mbhamrickins.com — or bring to Boiling Springs or Shelby — Questions? 1-800-993-3800