



Conservator Bond Application

Please make sure the information is complete and legible.

County/State: _____ Case #: _____ Estate Amount: \$ _____

Applicant Information

Name: _____ Phone#: _____ Address: _____

City: _____ State: _____ Zip: _____ Email: _____

Social Security #: _____ Driver's License #: _____ State: _____

Annual Income: _____ Net Worth: _____ Date of Birth: _____

Do you own a home? _____ Rent? _____ Other: _____

Employed/Retired: _____ Position/Previous Position: _____

Length of Employment: _____ Employer Address: _____

City: _____ State: _____ Have you taken possession of the estate's assets?: _____

Has there been a prior bond filed in this estate before? _____

Relationship to the Decedent/Conservatee/Minor? _____

Share of the Estate inherited (if any)? _____

Have you had a criminal conviction? _____ Lost a civil judgment? _____ If yes, explain: _____

Have you or your Spouse filed a personal bankruptcy? _____ If yes, when? _____

Are you indebted to the Decedent/Conservatee? _____ If yes, amount? _____

Estate Information

Name of Decedent/Conservatee/Minor: _____

Date of Birth of Conservatee/Minor: _____ Brief Description of Conservatee's Condition _____

Estate Cash: _____ Securities: _____ Real Property: _____

Other Assets: _____ Annual Income (All sources): _____

Bank where ESTATE ACCOUNT will be opened: _____

City: _____ State: _____ Zip: _____

Where will securities be kept? _____

[In Reference to the Question Above: Safe deposit box, brokerage – Including Name & Address]

Does estate contain an ongoing business? _____ If yes, name? _____

Entity Type: _____ Will it be continued? _____ If yes, do you understand you must have a court order to continue business? _____

Attorney Information

Attorney handling the case: _____ State Bar #: _____

Law Firm: _____ Phone #: _____

Email: _____ Address: _____

City: _____ State: _____ Zip: _____

Do you understand the first year's bond premium is non-refundable? _____

Do you understand that all increases and reduction of the bond must be court ordered by the court? _____

Do you understand the bond is in effect until a final discharge is signed by the judge and a copy delivered to the surety? _____

Do you understand the bond premium is to be paid in full annually? _____

Do you understand you must retain an attorney throughout the administration of this estate? _____

If you need additional space to respond to any of these questions please attach your responses with this application and email to kgpaz@burke-insurance.com or fax to 575-525-1716. If you have any questions feel free to contact our office at 575-524-2222.

Signature

Date

Disclaimer: Please review carefully!

All applications for insurance are subject to underwriting qualification by the specific surety to which the application is submitted.

I understand that any insurance terms and definitions are meant for general informational purposes and not meant as specific advice or recommendations. For detailed information, it is my responsibility to contact Burke Insurance Group, LLC.

I understand that no coverage will be assumed bound or covered until I have received written or verbal confirmation from Burke Insurance Group, LLC.

This information is not an offer to sell insurance. Insurance coverage cannot be bound or changed via submission of this online form/application, email, voice mail or facsimile. No binder, insurance policy, change, addition, and/or deletion to insurance coverage goes into effect unless and until confirmed directly with a licensed agent. Note any proposal of insurance we may present to you will be based upon the values developed and exposures to loss disclosed to us on this online form/application and/or in communications with us. All coverages are subject to the terms, conditions and exclusions of the actual policy issued. Not all policies or coverages are available in every state.

Please contact our office at 888-546-8000 to discuss specific coverage details and your insurance needs. In order to protect your privacy, please do not send us your confidential personal information by unprotected email. Instead, discuss that personal information with us by phone or send by fax.

Statements on this website as to the policies and coverages and other content provide general information only and we provide no warranty as to their accuracy. Clients should consult with their licensed agent as to how these coverages pertain to their individual situation. Any hypertext links to other sites or vendors are provided as a convenience only. We have no control over those sites or vendors and cannot, therefore, endorse nor guarantee the accuracy of any information provided by those sites or the services provided by those vendors.

Information provided on this website does not constitute professional advice. If you have legal, tax or financial planning questions, you need to contact a qualified professional.

Burke Insurance Group, LLC. Commitment

Handle service requests in good faith based on registration information. All service requests will be confirmed to the client and they must contact Burke Insurance Group, LLC. in case of error.

While we do our best to physically and electronically safeguard our online service, we shall not be liable for, any damages to, or viruses that may infect, your computer equipment or other property as a result of your access to, use of, or browsing in our site or your downloading any materials, data, text, images, video or audio from our website.

Our Privacy Policies and Practices

We do not sell client information for any reason whatsoever.

We may collect non-public personal information about you from the following sources:

- information we receive from you on application or other forms;
- information about your transactions with us; and
- information we receive from a consumer reporting agency

We will not disclose non-public personal information about you to others unless the disclosure is necessary to conduct our business and is permitted by law.