

CPI BONDING COMPANY, P.C.

Your first "Choyce" in surety bonds

P.O. Box 4239
Cedar Hill, TX 75106-4239

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216 W. Belt Line Rd.
Cedar Hill, TX 75104

BOND APPLICATION ATTACHED

Due to a request for a new bond or an increase/decrease in an existing bond, we are furnishing your office with an emailed application for bond of executor, administrator, guardian or trustee.

Because these are such specialized bonds, the surety companies are requiring additional information particularly in regard to the applicants and the estate. If this is the FIRST TIME a bond is to be written in this estate or guardianship for this applicant, we require the following:

1. A fully completed, signed, dated and witnessed application. The financial statement information on the reverse side of the form must be fully completed. Both spouses must sign the application. Signatures must be dated and witnessed.
2. A copy of the Order setting the bond amount and appointing the applicant. (*Other information may be requested.*)
3. Payment of the bond premium. Please call our office for an exact quote. All rates are set by the State Board of Insurance.

To expedite matters, you may fax or email the finalized bond application and Order to our office. However, we must have the fully completed, properly executed application with ORIGINAL SIGNATURES and payment of premium in our office, prior to releasing the bond unless other arrangements have been made. We will be happy to work with you in these matters.

Because of the urgency associated with these bonds, we endeavor to respond promptly to all requests. Our office hours are 8:30 A.M. to 4:00 P.M. Monday through Friday. Please feel free to call our office if you have any questions or encounter any difficulties associated with the application or these instructions. We will be happy to assist you.

NOTE: We urge you to take advantage of our FREE PRE-APPROVAL SERVICES.

Cyndi Robertson-Holt
Patti Robertson Richardson

Established in 1974

PLEASE RETURN FORM
WITH ORIGINAL SIGNATURES
TO CPI AT ADDRESS SHOWN.
*THIS IS A CONDITION OF
BOND.

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APPLICANT INFORMATION: **Please type or use black ink. Questions? Please call our office.**

Full Name Social Security No. Age

Complete Address including City, State, Zip Are Code / Telephone #

How long at this location? Marital Status Number of Dependents

Employer's Name & Complete Address, City, State, Zip Area Code / Telephone #

Position or Title How long have you worked there? Salary / Income

Spouse's Full Name Social Security No. Job Area Code / Telephone #

Personal References (List 3) Complete address, City, State, Zip Area Code / Telephone #

1)
2)
3)

State Applicant's relationship to deceased, Incompetent, or Minor(s)

List Applicant's next of kin other than spouse. Give Name, Address, City, State, Zip Telephone #

Type of Bond Required Amount Has application been made to another surety?

Cause Number County County or Probate Ct. State

Complete the following as it is to appear on the bond. IN THE MATTER OF THE ESTATE OF

If administration, give date of death. If NCM (ward) or minor, give age or date of birth.
Age: DOB:

If administration, list heirs. (Attach second sheet if needed.)

Name Age Relationship Address

If administration, is there a WILL? If yes, submit a copy with this application. If so, give details of dissension. Is there any dissension relative to this estate among next of kin, heirs or creditors?

Assets of Estate: Cash Stocks & Bonds Real Estate Other Assets

*

Liabilities of Estate Mortgages on Real Estate

*

If estate covered under prior bond, give name of principal. Amount of Prior Bond

Name of Surety If different surety, state reason for change.

Do assets include ongoing business? If so, state nature of business. Will it continue?

Is applicant indebted to estate? If so, give nature of debt and amount.

Attorney's Name, Firm, Address & Phone

State Bar No.:

****ALL APPLICANTS - SEE REVERSE SIDE****

The following is the financial statement of and is to be completed by the person(s) applying for the bond. Independently prepared financials may be submitted if signed and dated and such shall be herewith incorporated to this agreement by reference. The indemnity, however, must still be signed by all applicants. DO NOT INCLUDE ASSETS OF THE ESTATE OR GUARDIANSHIP. A CREDIT REPORT WILL BE OBTAINED.

Answer YES or NO to the following questions. If any answer is YES, please provide explanation on separate page.

Have you ever (1) declared **bankruptcy**? _____ (2) had **judgments or liens** against you? _____ (3) been convicted of a **felony**? _____

ASSETS		LIABILITIES	
Cash on hand and in Banks	\$	Notes Payable to Banks	\$
U.S. Government Securities		- Secured	
Accounts, Loans & Notes Receivable		- Unsecured	
Cash Surrender Value Life Ins.		Notes Payable to Relatives	
Other Stocks and Bonds		Accounts/Notes Payable to	
Real Estate (1) Homestead		- Others	
(2) Other		- Credit Cards	
Automobiles Number ()		Rents and Interest Due	
Other Assets (Itemize)		Taxes Due	
		Liens on Real Estate	
		Other Liabilities (Itemize)	
TOTAL ASSETS	\$	TOTAL LIABILITIES	\$
		NET WORTH	\$

INDEMNITY *To be signed by all applicants*

- I certify the above financial information is true and correct.
 - I authorize the company to make any credit checks it deems necessary.
 - I certify all of the questions answered are true and correct.
- IN CONSIDERATION of the execution of such Bond, and compliance with a promise of the undersigned made prior thereto, the undersigned hereby agree, for themselves, their personal representations, successors and assigns, jointly and severally, as follows:
- To pay the surety an advanced premium for the first year or a fractional part thereof that is fully earned and the same amount annual thereafter or any minimum earned premium until the surety shall be discharged or released from any and all liability and responsibility under said bond, and all matters arising therefrom, and until competent written legal evidence of such discharge or release, satisfactory to the surety, is served upon the surety.
 - To indemnify and keep indemnified the surety and hold and save it harmless from and against any and all liability, damage, loss, cost and expense of whatsoever kind or nature, including counsel and attorney's fees, which the surety may at any time sustain or incur by reason or in consequence of having executed or procured the execution of the bond or enforcing this agreement against any of the undersigned or in procuring or in attempting to procure its release from liability under the bond.
 - If the surety shall set up a reserve to cover any liability, claim, suit or judgment under said bond, the undersigned will, immediately upon demand deposit with the surety a sum of money, equal to such reserve and any increase thereof, to be held by the surety as collateral security on said bond. Any such collateral shall be available in the discretion of the surety, as collateral security on any other or all bonds heretofore or hereafter executed for or at the request of any of the undersigned.
 - If the surety shall procure any other company or companies to execute or join with it in executing, or to reinsure said bonds, this Instrument shall inure to the benefit of such other company or companies, its or their successors and assigns, so as to give it or them 1/4 direct right of action against the indemnitors to enforce the provisions of this instrument.
 - An itemized statement of payments made by the surety for any of the purposes above specified, sworn to by an officer of the surety, or the voucher or vouchers for such payments, shall be prima facie evidence of the liability of the undersigned to reimburse the surety for such payments with interest.
 - The surety in its sole discretion and without notice to the undersigned, is hereby authorized but not required, (a) from time to time to make or consent to any change in said bond or to issue any substitutes for any renewal thereof, and this instrument shall apply to such substituted or changed bond or renewal; (b) take such action as it may deem appropriate to prevent or minimize loss under said bond, including but not limited to steps to procure discharge from liability under said bond; and (c) to adjust, settle or compromise any claim or suit arising under said bond and, with respect to any such claim or suit, to take any action it may deem appropriate and any adjustment, settlement or compromise made or action taken by the surety shall be conclusive against and binding upon the undersigned.
 - Each of the undersigned agrees to pay the full amount of the foregoing regardless of (1) the failure of the principal to sign any such bond or (b) any claim that other indemnity, security or collateral was to have been obtained or (c) the release, return or exchange by the surety with or without the consent of the undersigned, of any indemnity, security or collateral that may have been obtained or (d) the fact that any party signing this instrument is not bound for any reason.
 - Separate suits may be brought hereunder as causes of action accrue, and suit may be brought against any and all of the undersigned; and any suit or suits upon one or more causes of action, or against one or more of the undersigned, shall not prejudice or bar subsequent suits against any other or all of the undersigned on the same or any other cause of action, whether theretofore or thereafter accruing.
 - The undersigned hereby expressly waive notice from the surety of any claim or demand made against the surety or the principal under the bond or of any information the surety may receive concerning the principal, any contract or bond. The surety shall have the right to decline any or all bonds herein applied for and shall have the right to withdraw from or cancel the same at any time, all without incurring any liability to the undersigned.
 - Whenever used in this instrument the plural term shall include the singular and the singular shall include the plural, as the circumstances require. If any portion of this agreement be in conflict with any law controlling the construction hereof, such portion of this instrument shall be considered to be deleted and the remainder shall continue in full force and effect.

Signed this ____ day of _____, _____.

Principal and Personal Indemnitor

Witness

Spouse's Signature

Witness

Guarantor/Indemnitor

Witness