

\* To be completed by fiduciary/attorney with petitions for formal appointment, sale of real estate or trustee appointment.

Estate of \_\_\_\_\_

Fiduciary's Name: \_\_\_\_\_

Address: \_\_\_\_\_

Fiduciary's relationship to decedent/ward: \_\_\_\_\_

Type of matter: (check #1, #2, or #3)

- 1.  Estate       Testate      or       Intestate      AND       Supervised      or       Unsupervised
- 2.  Conservatorship       Adult      OR       Minor
- 3.  Trust

4. Bond should be considered because:

- a.  Petition for formal appointment of a personal representative in an intestate estate
- b.  Petition for formal appointment of a personal representative in an testate estate and either:
  - the will does not prohibit bond
  - OR**  the will relieves the PR of bond but an interested person requests bond and asks the court to find that bond is desirable
- c.  A Special Personal Representative is requested
- d.  Demand by an interested person with an interest of more than \$2500
- e.  Sale of real estate

5. Real estate: \_\_\_\_\_ Estimated value \$ \_\_\_\_\_

Location \_\_\_\_\_

6. Personal estate: \_\_\_\_\_ Estimated value \$ \_\_\_\_\_

Description \_\_\_\_\_

7. Estimated income from personal and real estate in next year \$ \_\_\_\_\_

8. Total of personal estate and estimated income (Line 6 + Line 7) \$ \_\_\_\_\_

Date: \_\_\_\_\_ Prepared by: \_\_\_\_\_

Do not write below this line – For court use only

Judge to Complete

1.  Bond ordered:  
 Corporate \$ \_\_\_\_\_ OR  Personal (  \$ 2500 or  \$ \_\_\_\_\_ )

2.  No bond is ordered because:  court does not find it necessary at this time  
 the will relieves PR of bond and the court finds it is not desirable  
 the will requires bond but the court determines it is not necessary

3. Letters are:  not restricted  
 restricted to prohibit sale of real estate without court order  
 to include expiration date of 1 year from qualification

4.  Probate staff to return file to me for review of bond when inventory is filed since information is currently insufficient to determine bond.

Date: \_\_\_\_\_ Initials of Judge: \_\_\_\_\_

Return to: \_\_\_\_\_