

PLEASE COMPLETE AND RETURN TO THE PROBATE CLERK OF THE HAMPTON
CIRCUIT COURT, 101 KING'S WAY, P.O. BOX 40, HAMPTON, VA 23669
PHONE: (757) 727-6297

CONFIDENTIAL

FIDUCIARY INFORMATION

1. Name: _____

2. Age: _____ Date of Birth: _____

3. Sex: _____ Marital status: _____

4. Do you understand what is involved in being an Executor, Administrator, Trustee,
Guardian, or Conservator ("Fiduciary")? _____

A. Do you understand that the job of a Fiduciary may take a significant amount of
our your time? _____

B. Do you understand that you are not required to serve as Fiduciary, that you may
decline to serve, and that you are voluntarily accepting this position? _____

5. What is your current residence address (physical location, not P.O. Box): _____

Please Note: You must notify the Clerk's Office immediately if your address changes.

6. How long have you lived at your current address? _____

7. Are your payments current on your mortgage or rent? _____

8. Have you ever been foreclosed upon or evicted from where you were living; and if so,
provide the date and describe the circumstances? _____

9. What is the level of education that you have completed? _____

10. Employer Name: _____
Employment address: _____
11. How long have you worked for your current employer? _____
12. Please describe your work experience and work history: _____

13. Home telephone number: _____
Cell Phone Number: _____
14. Work telephone number: _____
15. Do you maintain a personal bank account? _____
16. Do you regularly balance your personal bank account(s)? _____
17. Have you ever overdrawn your account or “bounced” a check? _____
If so, how often in the last two (2) years? _____
18. Have you filed your personal federal and state income tax returns for the last three (3) years? _____
19. Do you have any civil claims pending against you; and if so, please describe: _____

20. Are there any outstanding, unpaid judgments against you; and if so, provide the date of the judgment, the original amount of the judgment, the current unpaid balance and describe the nature of the claim: _____

21. Have you ever been convicted of an offense involving lying, cheating or stealing; and if so, provide the dates(s) and describe the nature of the offense and the circumstances: _____

22. Have you ever been convicted of a felony; and if so, provide the date(s) and describe the nature of the offense and the circumstances: _____

23. Do you have any criminal charges pending against you; and if so, describe the nature of the charges and the circumstances: _____

24. Have you filed for personal bankruptcy; and if so, provide the date and indicate whether the case is closed: _____

25. Have you filed for business bankruptcy; and if so, provide the date and indicate whether the case is closed: _____

26. Do you require assistance in maintaining your personal affairs, including financial matters; and if so, please describe: _____

27. Describe your relationship to the Decedent/Minor/Incapacitated Adult: _____

28. Are you familiar with the personal affairs of the Decedent/Minor/Incapacitated Adult, including financial affairs? _____

29. Do you know the members of the family/next of kin of the Decedent/Minor/Incapacitated Adult? _____

30. What is your approximate net worth (assets minus liabilities)?

Between \$0.00 and \$24,999.99 _____

Between \$25,000.00 and \$49,999.99 _____

Between \$50,000.00 and \$99,999.99 _____

Over \$100,000.00 _____

31. IF THE ESTATE/TRUST OF THE DECEDENT/MINOR/INCAPACITATED ADULT HOLDS STOCKS OR BONDS:

A. Do you invest in stocks and/or bonds? _____

B. Have you ever worked with a stockbroker? _____

32. IF THE ESTATE/TRUST OF THE DECEDENT/MINOR/INCAPACITATED ADULT HOLDS REAL PROPERTY:

A. Have you ever owned real property? _____

B. Have you rented or leased any of your property to others? _____

33. IF THE ESTATE/TRUST OF THE DECEDENT/MINOR/INCAPACITATED ADULT OWNS A BUSINESS:

A. What is the nature of the business interest? _____

B. Have you ever owned and operated your own business?_____

C. Do you have any experience in this form of business?_____

D. How do you propose to administer the business?_____

34. Do you have any limitations that would prohibit you from performing your duties as a
Fiduciary?_____

35. Do you believe you are capable of performing the duties of a Fiduciary, and are you
voluntarily willing to serve in that position?_____

Date: _____

Signature