

# Administration Bond PROPOSAL



## FOR OFFICE USE ONLY

Date of Acceptance FROM  Time  AM  PM

Policy No.

Area/Branch

Area/Branch Number

Agency

Agency No. & Chk Ltrs

### Note:

The insurer with which your contract will be concluded is Aviva Insurance Limited ("the Company"). The insurance will not be in place until the proposal has been accepted by the Company. The Company reserves the right to decline any proposal. A specimen of the policy/bond normally issued will be supplied on request.

Please provide the following information using CAPITAL LETTERS and ticking boxes where appropriate. Please give additional information, where required, by covering letter.

### AMOUNT OF BOND REQUIRED

(double amount of Gross Estate including current market value of immovable property)

€

## 1 Proposed ADMINISTRATOR/ADMINISTRATRIX

(a) Full Name  Relationship to deceased or, where will annexed, capacity in which he/she is applying for Grant

Address

Age  (b) Is proposed Administrator/Administratrix well known to you? YES  NO

Occupation  (c) Can you, from your knowledge of his/her character and circumstances, recommend acceptance of the proposed Administrator/Administratrix?  YES  NO

## 2 Deceased

(a) Full Name  Description (i.e. marital status etc.)

Address  Date  and place of death

Age  Indicate whether deceased died TESTATE  or

Occupation  INTESTATE

*If testate, please attach copy of the Will and give reason for present application*

## 3 Beneficiaries

List all BENEFICIARIES Full Name	Address	Indicate if not sui juris	Date of birth if under 18	Relationship to deceased	Share

### State fully how it is proposed to deal with the shares of any minor beneficiaries or beneficiaries who are not sui juris

(b) Have all beneficiaries been traced? YES  NO

If NO, state in detail the enquiries that have been made and if application will be made to the Court

(c) Are any life interests involved?  YES  NO

If YES, state the steps that will be taken to safeguard the assets

- (a) Is leasehold and/or real property being sold? YES NO  
 If **NO**, how will each beneficiary get his/her share?

- (b) Did the deceased carry on a business?    
 If **YES**, state how it is proposed to deal with this

- (c) Is any litigation threatened, pending or proceeding in connection with the Estate?    
 If **YES**, give full details

- (d) Will statutory advertisements for claims against the Estate be published?    
 If **NO**, state reason and that you are satisfied all debts have been traced

- (e) Has any administration taken place already?    
 If **YES**, give details

- (f) How long do you estimate it will take to complete the administration?

5

- Has a proposal been submitted to any other surety or has private security been sought?    
 If **YES**, give details

6

- Please attach a copy of your current Professional Indemnity Insurance Certificate, Please tick  if already provided.

7

**IMPORTANT: WHERE BOND EXCEEDS €200,000 PLEASE SUPPLY A COPY OF THE AFFIDAVIT FOR REVENUE**

# Important

You ( "You" means the Proposed Administrator/Trix and/or the Solicitor acting on behalf of the Proposer Administrator/trix) must tell us any other facts which are likely to affect whether we agree to provide a bond or how we assess the risks proposed for insurance. If You are not sure whether you should tell us something please tell us anyway. This is for your protection because if You do not give us all the information we need or the information provided is untrue we may seek to issue legal proceedings against You and or claim against the Solicitors Professional Indemnity Insurance in these circumstances in the event that payment under the bond is issued by Aviva.

Under the third EU Non-life Directive we must give you the following information before you buy your policy.

**The law that applies to the contract** – Under the relevant European and Irish laws, we Aviva Insurance Limited and you, the proposer, are free to choose the law that will apply to the contract. We propose that Irish law will apply to the contract, We, Aviva Insurance Limited, will provide the insurance under this policy.

**Complaints procedure** – We aim to give excellent service to all our customers; however, we recognise that things may occasionally go wrong. We will do our best to deal with your complaint as effectively and quickly as possible. If you arranged your cover through an intermediary or broker, please send your complaint to them. If your complaint is not sorted out to your satisfaction, please contact:

Aviva Insurance Limited at 1850 666 555.

You can also write to the Branch Manager - Ireland, Aviva Insurance Limited, One Park Place, Hatch Street, Dublin 2 or you can contact the following

• **Insurance Ireland's Insurance Information Service, 39 Molesworth Street, Dublin 2**

Phone: 01 676 1914  
Fax: 01 676 1943  
E-mail: iis@insuranceireland.eu  
Website: www.insuranceireland.eu

• **The Financial Services Ombudsman Bureau, 3<sup>rd</sup> Floor, Lincoln House, Lincoln Place, Dublin 2**

Phone: 01 662 0899  
LoCall: 1890 88 20 90  
Fax: 01 662 0890  
E-mail: enquiries@financialombudsman.ie  
Website: www.financialombudsman.ie

You will not lose your right to take legal action if you contact either of the above.

**DATA PROTECTION** – Aviva Insurance Limited ("we", "us" or "our"), as data controller, will keep the information you provide about yourself and about third parties confidential. We may use it to advise on, provide and administer insurance products and financial services provided by us or other Aviva companies and sometimes with our affiliates and/or commercial partners, in order to comply with legal obligations imposed on us. We may share the information both inside and outside of the European Economic Area, in confidence, for these purposes with agents or service providers we have appointed, private investigators, regulatory organisations, other insurance and financial services companies (directly or via a central register), other Aviva group companies, those to whom we outsource certain business operations and as required by law. We will process this information and store it on our computer and manual record systems.

To assist in preventing, detecting and/or protecting our customers and ourselves from theft and fraud, we may use your information to make searches of our or other Aviva companies' records. If you give us false information or fail to disclose information and we suspect fraud, we will record this. We also participate in industry databases such as those operated by Insurance Ireland for the purpose of sharing of information among insurance companies as a check against non-disclosure.

From time to time, we may record your telephone calls for verification and training purposes.

If you would like a copy of the details we hold about you, please write to the Regulation and Compliance Manager, Aviva Insurance Limited, One Park Place, Hatch Street, Dublin 2. Please enclose the correct fee (€6.35). You also have the right to correct any errors in the information held about you, block certain uses or object to the processing of your personal data.

**Declaration** – We confirm that, having made due and diligent enquiries, that all the answers above are correct and complete and that we have not withheld, mis-stated or misrepresented any information material to the issuing of a bond.

Signature of Solicitor

Date:  /  /

Address:

## FOR COMPLETION BY THE PROPOSED ADMINISTRATOR/RIX

I/We .....confirm my/our authorisation to ..... (Solicitors)

to propose on my/our behalf to the Aviva Insurance Limited (the Company) for an Administration Bond in the matter of the Estate

of .....

and further, undertake and agree that the conduct and control of the administration of the said Estate shall not be taken out of the hands of the said solicitors without the written consent of the Company.

Signature of proposed administrator/rix.....

Date:

Witness: .....

Address: .....

.....

.....

Occupation: .....



***For our joint protection, we may record and  
monitor phone calls.***

**Aviva Insurance Limited**

Aviva Insurance Limited, trading as Aviva, is authorised by the Prudential Regulation Authority in the UK and is regulated by the Central Bank of Ireland for conduct of business rules.  
Registered Branch Office in Ireland no. 900175. Registered Branch Address One Park Place, Hatch Street, Dublin 2.  
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