

Credit Union Guardian/Conservator Cover Sheet

NOTICE: Navy Federal currently does not offer Guardian/Conservator or fiduciary accounts and does not retitle existing accounts as such. However, Navy Federal may allow the Guardian/Conservator limited access to manage the Ward's existing accounts, income, and benefits as permitted by applicable state law.

Please complete the following form and return it with the Guardian/Conservator court documents. A copy of a government- or state-issued ID is required for any Guardian/Conservator that is not a Navy Federal member. If additional information is needed, an NFCU representative will contact the Guardian/Conservator within two (2) business days of document receipt.

Submission Options

Fax: 703-206-1373

▶ Email: FAX_POA_Support@navyfederal.org

▶ Mail: Navy Federal Credit Union, Attn: RS Power Of Attorney P.O. Box 36460, Pensacola, FL 32526-6460

Note: This Cover Sheet is not a legal Guardian/Conservator court document. To avoid a delay in processing, please attach all applicable court documents. Documents associated with court appointments may be referred to as a Final Decree / Judgement / Order of Appointment and/or Letters of Appointment / Certificate of Qualification. Document names/titles may differ depending on the county and state where court proceedings took place. Please contact your attorney, the courthouse, and/or Probate courts for the required documents issued.

Ward Information						
Name: First			MI	Last	Last	
Please provide one or all o	f the follo					
Access Number		A	Account Number		Social Security Number	
Guardian/Conservato	r Inforn	nation				
Access No.	Name: First		MI		Last	Suffix
Mailing Address: Street	ailing Address: Street		City	Stat	e	Zip Code
Contact No. Alt. Contact N		Alt. Contact No.		Email Address	Email Address	
If non-member, please also	provide	the following i	nformation:			
Agency/Public Fiduciary (If applicable)			Date of Birth		Social Security Number	
ID Type: Please include a copy	of your non-	-expired governm	ent- or state-issued ID selected b	pelow and ensure the imag	ge is clear and legible.	
Driver's License No.				Passport No.		
State-Issued ID No.				Other (Please provide details.)		
State Bar License No.						
Please describe your in	tentions	for use of the	he Guardianship/Conse	ervatorship docun	nents.	

Once a Guardianship or Conservatorship is received, it will be retained until revoked or terminated by court order. Temporary orders expire or are made permanent by court order only. If you have any questions, please contact us anytime toll-free at 1-888-842-6328.

