



Credit Union Guardian/Conservator Cover Sheet

NOTICE: THIS COVER SHEET IS NOT A LEGAL GUARDIAN/CONSERVATOR COURT DOCUMENT.

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 along with the Guardian/Conservator court documents.

- A copy of a government-issued ID is required for any Guardian/Conservator that is not a Navy Federal member.
- If an entity has been appointed as Guardian or Conservator, please provide a Corporate Resolution, Letter of Incumbency, or delegation list that identifies the authorized representatives who are empowered to act on behalf of the entity.
- To prevent processing delays, please attach all relevant court documents. These may include Final Decree, Judgment, Order of Appointment, Letters of Appointment, or Certificate of Qualification. Note that document names and titles may vary by county and state. For the required documents, please consult your attorney, or the courthouse in which the order was issued.
- Once Guardian or Conservator documents are reviewed, they will be retained until they are dismissed or terminated by court order. If the court order or letter reflects an expiration date, you will be required to provide court documents indicating an extension, permanent appointment, or dismissal/termination of the appointment. If you have any questions, please contact us anytime toll-free at 1-888-842-6328.

Ward Information				
Name: First	MI	Last	Suffix	
Please provide one or all of the following:				
Access Number	Account Number	Social Security Number		

Guardian/Conservator Information				
Access No. (if applicable)	Name: First	MI	Last	Suffix
Current Home Address: (cannot be a post office box)	Street	City	State	ZIP Code
Mailing Address: (if different from above address)	Street	City	State	ZIP Code
Email Address	Cell Phone No.*	Home Phone No.	Work Phone No.	Fax No.

If non-member, please also provide the following information:				
Date of Birth (MM/DD/YYYY)	Social Security No. (SSN) or ITIN	Agency/Public Fiduciary (If applicable)		

ID Type: A clear and legible copy of your non-expired state or government-issued ID is required.				
<input type="checkbox"/> State ID <input type="checkbox"/> Passport <input type="checkbox"/> Government ID <input type="checkbox"/> Other ID Type: _____	ID No.	State	Expiration Date (MM/DD/YYYY)	

Please describe your intentions for use of the Guardianship/Conservatorship documents.				
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Submission Options				
► Fax: 703-206-1373	► Branch: Go to navyfederal.org/branches-atms to find your closest office.			
► Email: FAX_POA_Support@navyfederal.org	► Online: Sign in to Online Banking ► Select the envelope icon in the top right corner ► Select "CREATE NEW MESSAGE" ► Under "I have a question about," select "General" ► Under "Reason," select "Power of Attorney" ► Under "Message," enter your request ► Click "Choose file to upload," to attach applicable documents and then click "Send."			
► Mail: ATTN: Power of Attorney 5550 Heritage Oaks Drive Pensacola, Florida 32526-7859				

*If you provide a cell phone number, Navy Federal has your permission to place automated non-marketing calls and text messages to that number. Message and data rates may apply.

