

Guardianship Account:

All of the following are needed to open a Guardianship and/or Conservatorship account:

1. Certified Copy of the court order establishing the Guardianship and/or Conservatorship; AND
2. SSN/ITIN for the beneficiary/ward (person under the Guardianship and/or Conservatorship).

If on hand, upload to the MRM session. If not, update the member's email and give the member the portal link to upload:

<https://www.numericacu.com/dec/eprocessing>

