

# CHECKLIST

# DOCUMENTS REQUIRED FOR GUARDIANSHIP

JR-304

Rev. Abr. 25

* APPLICATION ☐ RESIGNATION ☐ RENEWAL
* Mental Disability ☐ Physical Disability ☐ Minor ☐ Imprisonment

Name of pensioner/beneficiary:

Social Security: - - Date of Birth: / /

Name of proposed guardian:

Social Security: - - Date of Birth: / /

Identification Number: ☐ Driver’s license ☐ Passport

# RECEIVED DOCUMENTS

* Application for Appointment as Guardian (Form JR- \_\_\_)
* Medical Certificate for Guardianship (Form JR- \_\_\_\_)
* Photo Id. ☐ Ward ☐ Proposed Guardian[1](#_bookmark0)
* Birth Certificate ☐ Ward ☐ Proposed Guardian
* A Copy of Social Security Card ☐ Ward ☐ Proposed Guardian[2](#_bookmark1)
* Criminal Record Certificate of the Proposed Guardian
* Marriage Certificate (if spouse is filing the application)
* License to operate issued by regulatory body (if an entity is applying for guardianship)
* Child Support Certification issued by ASUME to Proposed Guardian
* No debt Certification for All Concepts issued by CRIM to Proposed Guardian
* No debt Certification issued by the Department of the Treasury to Proposed Guardian
* A Certified Copy of Court Order (if applies)
* Appointment of Guardian from the Social Security Administration, the SIFC, or AACA (if applies)
* Primary Physician’s Report
* Bank Account Certification naming both
* Consent and Authorization Form
* A certified copy of the Will or Court Order (if guardian was named in a will or appointed by a competent court outside of Puerto Rico.
* Affidavit for Appointment as Guardian
* Other:

**FOR INTERNAL USE BY THE RETIREMENT BOARD**

Person receiving the documents:

Signature:

Date: / /

Comments:

1 If an entity is applying for guardianship, the identification of the person in charge of the entity’s administration must be furnished. If the person who is filing the documents is not the person in charge of the entity’s administration, a Corporate Resolution authorizing such person to act on behalf of the corporation must be furnished.

2 If an entity is applying for guardianship, Form SS-4 showing the EID or Employer Identification Number must be filed.

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