

YOU'RE MY TRUSTED CONTACT PERSON

! This form should be completed by you and given to your **Trusted Contact Person**.

I, _____, have appointed you, _____, as my Trusted Contact Person on _____.

Name of Investment Firm: _____ Account type (optional): _____
Name of Financial Advisor: _____ Phone: _____
Address: _____ Email: _____

If you are not comfortable acting as my Trusted Contact Person, please let me know.

WHAT YOU SHOULD DO IF YOU'RE CONTACTED



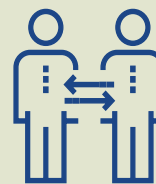
My financial advisor may ask you questions about me.
The information you provide may assist them in protecting my account or investments. The conversation may raise topics that are difficult in nature.



You can answer their questions to the best of your ability.
Although you are under no obligation to do so. If you don't know the answer or wish not to answer, it's okay to say so.



You may also involve law enforcement, elder abuse organizations or the provincial or territorial public guardian and trustee office if there are concerns about financial exploitation or abuse.



MAKE SURE THE PERSON YOU ARE TALKING TO IS FROM MY INVESTMENT FIRM.

If you are unable to verify that an unsolicited call is legitimate, hang up. Use the information in this pamphlet to call my financial advisor or investment firm.

THE ROLE OF A TRUSTED CONTACT PERSON

As my Trusted Contact Person, you may be asked to assist my financial advisor in protecting my investment account.

You may know more about my personal situation, my family dynamic or health information. You may be asked questions about me if there are concerns about financial exploitation or diminished mental capacity, or if there is an emergency.

WHEN YOU MIGHT BE CONTACTED

I have given my financial advisor permission to contact you under these circumstances (check all that apply):

To confirm my contact information

If financial exploitation is suspected

To confirm my legal representative(s)

If there are concerns about mental capacity

Other (please specify): _____

TYPES OF QUESTIONS YOU MIGHT BE ASKED

My financial advisor may ask you questions depending on the situation. For example,



YOU MAY BE ASKED TO CONFIRM MY CONTACT INFORMATION
if my advisor is unable to reach me after several attempts



OR, IF THERE ARE CONCERNS ABOUT MENTAL CAPACITY
my advisor may ask if you have noticed changes in my behaviour



A Trusted Contact Person cannot make financial decisions or account changes. An individual named as a Trusted Contact Person is not a legal representative, guardian or trustee.