You’re my trusted contact

person

This form should be completed by you and

given to your trusted contact person.

Note

This document includes content that you may adapt into a form. It is intended for your representative to provide to their client. The client may, at their discretion, provide this to their trusted contact person (**TCP**) to let them know that they have been named as their TCP and provide an overview of what this means. Sections highlighted in green are for your representative to complete with their client. Sections highlighted in yellow are where your firm should input the appropriate information.

I, [investor name], have named you, [TCP name], as my trusted contact person on [date].

**Name of Investment Firm:**  [name of investment firm]

**Name of [TITLE]:** [name of REPRESENTATIVE TITLE]

**Account type (optional):** [account type]

**Address:** [address]

**Phone:**  [phone]

**Email:**  [email]

If you are not comfortable acting as my trusted contact person, please let me know.

Trusted Contact Person FAQs

## The role of a trusted contact person

As my trusted contact person, you may be asked to assist my [TITLE] in protecting my investment account. You may be asked questions about me, for example, if my [TITLE] has concerns that I may be experiencing financial exploitation or diminished mental capacity.

As someone I trust, you may know more about my personal situation, my family dynamic or health information than my [TITLE] and you may be asked to help protect my account if there is an emergency.

For my [TITLE] to contact you, I have provided them with [your name, address, email address and/or phone number.]

## When you might be contacted

I have given my [TITLE] permission to contact you under these circumstances (check all that apply):

* To confirm my contact information
* To confirm my legal representative(s)
* If financial exploitation is suspected
* If there are concerns about mental capacity
* Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## What you should do if you’re contacted

My [TITLE] may ask you questions about me. The information you provide may assist them in protecting my account or investments. The conversation may raise difficult topics. 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, provincial seniors advocate offices or the provincial Office of the Public Guardian and Trustee (PGT) 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 above contact information to call my [TITLE] or investment firm.

## Types of questions you might be asked

It will depend on the situation and the specific concerns identified by my [TITLE]. For example, you may be asked to confirm my contact information if the [TITLE] is unable to reach me after several attempts or you may be asked if you can confirm information about my legal representative(s).

The [TITLE] may also ask if you have noticed changes in my behaviour if they are concerned about changes in mental capacity, or they may ask you about signs of potential financial exploitation that they have observed.

## Additional instructions and information:

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***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.***

Visit [firm website or GetSmarterAboutMoney.ca] for more information about the role of a trusted contact person and protecting investment accounts.