# Add a Trusted Contact

**PROTECTING YOUR WEALTH**—Giving Your Advisor Someone to Call if You Can't Be Reached

## WHAT IS A TRUSTED CONTACT?

A person you authorize us to call in limited situations—like suspected fraud, unreachable account instructions, or health events.

## WHO SHOULD ADD ONE?

- Every client with an investment account
- Especially helpful for retirees, frequent travelers, or those with health concerns

## WHY IT MATTERS

- Adds an extra layer of protection against scams & financial abuse
- Speeds up problem-solving when time is critical
- Gives us clarity—without sharing account details

## HOW TO ADD ONE

1. Choose someone you trust—a **relative, close friend, or professional**.
2. Provide their **name, phone, and email** to your advisor.
3. Update anytime through your secure **client portal or by phone**.

## CAN AND CANNOT

- ✓ **CAN** confirm your whereabouts or health status
- ✓ **CAN** help validate unusual withdrawal requests
- ✗ **CANNOT** make trades or withdrawals
- ✗ **CANNOT** access your account log-in or statements
- ✗ **IS NOT** a Power of Attorney or Guardianship