

Is your advisor asking you for a Trusted Contact Person?

Your registered financial advisor is required to ask you to name a Trusted Contact Person (TCP). There are a number of very important reasons to appoint a TCP.



What is it?

A TCP is a person you authorize your financial firm to contact in limited circumstances.

Why have one?

A TCP can help your registered financial advisor help you, if needed.

Who should have one?

We suggest a TCP for anyone who has an investment account.

How would having a Trusted Contact Person help me?

Maybe your registered financial advisor needs to get in touch with you but can't when:



You are travelling



There is a natural disaster



There is a concern about fraud



You are having a health issue



Your TCP cannot authorize transactions on your behalf.



Your TCP cannot make decisions about your account.



Being a TCP does not make them a power of attorney, legal guardian, trustee or executor.

Talk with your financial advisor today about naming a Trusted Contact Person.