



Trusted Contact Form

A "trusted contact person" is a person that you authorize your Investment Advisory or brokerage firm to contact in limited circumstances, such as if your broker has trouble reaching you or has a reasonable belief that your account may be exposed to possible financial exploitation. A trusted contact person must be age 18 or older.

Full Legal Name/Account Title

Account Numbers to add the Trusted Contact

TRUSTED CONTACT #1

Trusted Contact First Name

Trusted Contact Middle Name

Trusted Contact Last Name

Relationship

Primary Phone Number

Email Address

Mailing Address

City

State

Zip Code

TRUSTED CONTACT #2

Trusted Contact First Name

Trusted Contact Middle Name

Trusted Contact Last Name

Relationship

Primary Phone Number

Email Address

Mailing Address

City

State

Zip Code



I understand that Secure Planning, LLC may contact the Trusted Contact Person(s) for the following reasons

- If there are questions or concerns about my whereabouts or health status;
• If Secure Planning suspects that I may be a victim of fraud or financial exploitation;
• If Secure Planning suspects that I might no longer be able to handle my financial affairs;
• To confirm the identity of any legal guardian, executor, trustee, authorized trader, or a power of attorney; or
• If Secure Planning has any other concerns or is unable to contact me about my account(s) with Secure Planning

I further agree that 1) this Authorization does not impose any obligation or requirement that Secure Planning contact or communicate with my Trusted Contact Person(s) ; 2) This Authorization is not a power of attorney or trade authorization and does not authorize the Trusted Contact Person(s) to make any investment decisions or transact any business with Secure Planning on my behalf; 3) This Authorization is optional and I may change or withdraw it at any time by notifying Secure Planning, in writing or verbal authorization 4) The Trusted Contact Person(s) named above is 18 years of age or older; 5) I may provide more than two Trusted Contact Persons by completing and signing additional Authorizations; 6) Secure Planning is released or discharged from all claims, causes of action, damages, losses, expenses, costs, and liabilities of any kind that may arise out of, relate to, or are in connection with the release of, or failure to release, personal and/or account information to the Trusted Contact Person(s)

Account Owner Name (Printed)

Account Owner Signature

Date

Co-Account Owner Name (Printed)

Co-Account Owner Signature

Date