

## What is a Trusted Contact Person?

An extra layer of protection for your financial well-being.

**Your Trusted Contact Person (TCP) acts as a financial emergency contact.**

They don't have access to your account and can't make decisions for you. However, your Open Access contact can reach out to them if there's ever a concern about your well-being or account safety.

### When would Open Access reach out to your TCP?



If we're concerned about your safety or well-being



To confirm contact information if you've moved or are travelling



If instructions or transactions seem unusual



To verify Power of Attorney (POA) details



If there are signs of financial exploitation or scams

### What a TCP cannot do:



Place trades or make financial decisions



Access your account or private info



Act as a Power of Attorney, legal guardian, trustee, or executor

### Who should you choose?

Select someone who is:

- ✓ Mature and trustworthy
- ✓ Knows your situation
- ✓ Isn't already your Power of Attorney or trading authority

### How to name or update your TCP

**Submit a Trusted Contact Person Authorization Form, which will replace or revoke any prior designation. Just let your TCP know you are naming them.**



**Click below to get started**

[Submit your form online](#)

If you would like to update your Trusted Contact Person information, please click the link above to resubmit.