You're My Trusted Contact Person

This form should be completed by you and given to your Trusted Contact Person.

Name of Investment Firm: ______________________________
Name of Financial Adviser: ______________________________
Account type/number (optional): ______________________________
Address: ______________________________
Phone: ______________ Email: ______________

Helpful Information for Your Trusted Contact Person

The role of a Trusted Contact Person (TCP)

As my TCP, you may be asked to assist my financial adviser in protecting my investment account. You may be asked questions about me if there are concerns about 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 financial adviser and you may be asked to help make decisions about protecting my account if there is an emergency.

What you should do if you're contacted

The financial adviser may ask you questions about me. The information you provide may assist them in protecting my account or investments. The conversation may raise topics that are difficult in nature. Answer their questions to the best of your ability. If you don't know the answer, it's okay to say so.

You may also involve law enforcement, elder abuse organizations or the provincial Office of the Public Guardian and Trustee of Manitoba 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 contact information above to call my financial adviser or investment firm.

Helpful Information for Your Trusted Contact Person (continued)

Contact Circumstances

I have given my financial adviser permission to contact you under these circumstances (check all that apply):

- ☐ To confirm my contact information
- ☐ To confirm my legal representative(s)
- ☐ To provide information if financial exploitation is suspected
- ☐ To provide information if there are concerns about mental capacity
- ☐ Other (please specify): ______________________

Types of questions you might be asked

It will depend on the situation and the specific concerns identified by my financial adviser. For example, you may be asked to confirm my contact information if the adviser is unable to reach me after several attempts. Or, if there are concerns about mental capacity, the adviser may ask if you have noticed changes in my behaviour.

! A Trusted Contact Person *cannot* make financial decisions or account changes.

Helpful Links:

- MB Public Guardian and Trustee — **gov.mb.ca/publictrustee**
- Canadian Anti-Fraud Centre — **antifraudcentre-centreantifraude.ca**
- Recognize Investment Fraud — **recognizeinvestmentfraud.com**
- Manitoba Association of Senior Centres — **manitobaseniorcentres.com**
- A&O Support Services for Older Adults — **aosupportservices.ca**

Visit **moneysmartmanitoba.ca** for more information about a TCP.

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