Is your financial firm asking you for a TRUSTED CONTACT?

WHAT IS IT?
A "trusted contact" is a person you authorize your financial firm to contact in limited circumstances.

WHO SHOULD HAVE ONE?
We suggest a trusted contact for anyone who has an investment account.

How would having a trusted contact help me?

Maybe your investment professional needs to get in touch with you but can’t when:

- You are traveling
- There is a natural disaster
- There is a concern about fraud
- You are having a health issue

Your trusted contact CANNOT:
- make trades in your account
- make decisions about your account

Being a trusted contact DOES NOT make them a power of attorney, legal guardian, trustee or executor

A trusted contact is someone who can help your financial firm help you, if needed. Add one today!
finra.org/trustedcontact