



Trusted Contact Person (TCP)

A Trusted Contact Person (TCP) is someone you choose who can help us protect your financial well-being. Please provide the name and contact information for a person that you trust to assist us in protecting your account. This person does not have the power to make any decisions on your behalf. We would contact this person to confirm or make inquiries about any of the following:

- Your current contact information
- Possible financial exploitation affecting you or your account
- Concerns about your mental capacity as it relates to financial decision making
- The identity of any legal guardian, executor, trustee or other personal or legal representative

You may designate multiple Trusted Contact Persons by using multiple copies of this form and ranking the order of your preference for those individuals to be contacted by KBH Wealth Planning. Please also note, we are not required to contact your Trusted Contact Person. The designation of a Trusted Contact Person is optional, and you may withdraw the designated Trusted Contact Person at any time by notifying us in writing.

If you would like to appoint a Trusted Contact Person, please fill out the form below:

I, _____ appoint the following individual to act as my Trusted Contact Person:
Client Name

Trusted Contact Person Information

Last Name

First Name

Address

City

Province

Postal Code

Primary Phone Number

Secondary Phone Number

Email Address

Relationship to Client

Client Signature

Date

Client Postal Code
(for verification purposes)

