

# YOU'RE MY TRUSTED CONTACT PERSON



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

I, \_\_\_\_\_, have appointed you, \_\_\_\_\_, as my Trusted Contact Person on (MM/DD/YYYY) \_\_\_\_\_.

Name of Investment Firm: **TriCert Investment Counsel**  
Address: **420 Wes Graham Way, Suite 312, Waterloo, ON N2L 0J6**

Phone: **(877) 291-3040**  
Email: **TriCertIC@TriCert.ca**

If you are not comfortable acting as my Trusted Contact Person, please let me know.

## WHAT YOU SHOULD DO IF YOU'RE CONTACTED



TriCert 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.

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You can answer their questions to the best of your ability.

Although you are under no obligation to do so. If you don't know the answer or wish not to answer, it's okay to say so.

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You may also involve law enforcement, elder abuse organizations or the provincial or territorial public guardian and trustee office if there are concerns about financial exploitation or abuse.



**MAKE SURE THE PERSON YOU ARE TALKING TO IS FROM TRICERT.**

If you are unable to verify that an unsolicited call is legitimate, hang up. Use the information in this pamphlet to contact us.

## THE ROLE OF A TRUSTED CONTACT PERSON

As my Trusted Contact Person, you may be asked to assist TriCert in protecting my investment account.

You may know more about my personal situation, my family dynamic or health information. You may be asked questions about me if there are concerns about financial exploitation or diminished mental capacity, or if there is an emergency.

## WHEN YOU MIGHT BE CONTACTED

I have given TriCert permission to contact you under these circumstances:

- To confirm my contact information
- If financial exploitation is suspected
- To confirm my legal representative(s)
- If there are concerns about my health or mental capacity

## TYPES OF QUESTIONS YOU MIGHT BE ASKED

TriCert may ask you questions depending on the situation. For example,



**YOU MAY BE ASKED TO CONFIRM MY CONTACT INFORMATION**  
if TriCert is unable to reach me after several attempts



**OR, IF THERE ARE CONCERNS ABOUT MY HEALTH OR MENTAL CAPACITY AS IT RELATES TO FINANCIAL DECISION MAKING**  
TriCert may ask if you have noticed changes in my behaviour



A Trusted Contact Person cannot make financial decisions or account changes. An individual named as a Trusted Contact Person is not a legal representative, guardian or trustee.