



## TRUSTED CONTACT FORM

### Why you should add a trusted contact to your account...

#### What is a trusted contact?

A trusted contact is a person who we can contact in the event that we cannot reach you. We recommend adding a trusted contact to all your accounts.

#### When would we reach out to your trusted contact?

- To address possible fraud involving your account.
- To confirm your mental or physical health status.
- To confirm your contact information in the case we have trouble reaching you, such as if you have a health crisis or are traveling out of the country.

#### What can your trusted contact do?

Your trusted contact may be asked to validate information about you or your accounts. It is important to note that a trusted contact cannot:

- Make trades in your account.
- Make decisions about your account.
- Receive access to your account.

#### What are the requirements of a trusted contact?

A trusted contact must be 18 years of age or older. They may be a family member, significant other, attorney, close friend, or another third-party. You may establish more than one trusted contact on each account. AAF Wealth Management, LLC recommends the designation of someone other than a spouse or a person with direct or indirect beneficial interest in your accounts.

**Authorization:** I, \_\_\_\_\_, authorize AAF Wealth Management, LLC to contact and disclose any information and/or documents related to my accounts under management with AAF Wealth Management, LLC, in addition to any additional information held by my current custodian to the person(s) listed below.

As such, I designate \_\_\_\_\_ as my trusted contact person, whose contact information is listed below, and to receive on my behalf any information related to my accounts managed by AAF Wealth Management, LLC. This authorization specifically excludes my trusted contact person from making any decisions on my behalf for my account(s) managed by AAF Wealth Management, LLC. This designation shall remain in effect until AAF Wealth Management, LLC receives written notification from me to terminate this authorization.

Relationship: \_\_\_\_\_

Trusted Contact's Address: \_\_\_\_\_

Mobile Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

\_\_\_\_\_  
Client's Name (Print)

\_\_\_\_\_  
Client's Signature

\_\_\_\_\_  
Date

This form supersedes any previous trusted contact designations that you've submitted.