

Account Number _____ and any
other accounts I may have at _____

Contact Authorization Form

By my signature below, I/We authorize _____ and its affiliates to share my/our nonpublic personal information* held at _____ to the named Authorized Individual(s) identified below.

I/We authorize this information to be shared with the Authorized Individual(s) in the discretion of _____. This authorization includes, but is not limited to, any of the undersigned client's information regarding securities, insurance, bank related, financial planning or other financial products or services offered by or through _____ or any financial information the undersigned may have provided to _____.

I/We understand that _____ may contact the named Authorized Individual(s) if there are questions/concerns about my whereabouts or health status (i.e., if _____ becomes concerned that I might no longer be able to handle my financial affairs) or in the event that _____ becomes concerned that I may be a victim of fraud or exploitation.

_____ suggests that the named Authorized Individual(s) not be someone authorized to transact business on the account, or who is already otherwise able to receive the information described above.

Name of Contact Person:		Relationship:	
Daytime Phone:	Evening Phone:	Email:	
Street Address:		City and State:	
Check here if this Contact Authorization supersedes a previous Contact Authorization:			

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Daytime Phone:	Evening Phone:	Email:	
Street Address:		City and State:	
Check here if this Contact Authorization supersedes a previous Contact Authorization: <input type="checkbox"/>			

I understand that there is no requirement that _____ reach out to my contact person and that I may withdraw this Contact Authorization at any time by notifying _____ in writing at the address shown on my account statement. By signing below, I and my heirs, hold _____ harmless if we either act, or fail to act, on your stated preferences based upon our own best judgement.

Client Signature

Client Signature

Printed Name

Printed Name

Date

Date

Multiple contact persons may be designated by completing additional copies of this form for each contact person.

* "Nonpublic personal information" includes, but is not limited to: financial account information and balances, recommendation for purchase of a security or insurance product, and, as defined in Title V of the Federal Financial Services Modernization Act of 1999 as amended, or as defined by any other federal or state law, personally identifiable financial information-(i) provided by a consumer to a financial institution; (ii) resulting from any transaction with the consumer or any service performed for the consumer; or (iii) otherwise obtained by the financial institution.