

# Trusted Contact Form



Mail application to: Thornburg, PO Box 219017, Kansas City, MO 64121

## What is a Trusted Contact Person?

A trusted contact person, who must be at least 18 years old, is someone you designate that Thornburg may contact in case of emergency or incapacity. Designating a trusted contact is not required, and does not authorize the named individual to transact or make changes to the owner's account.

You can add, remove, or change a trusted contact person at any time by notifying Thornburg in writing.

While this is an optional account feature, assigning a trusted contact person may be an important safeguard that could help us to protect you and your assets. No action is required if you do not wish to add a trusted contact person.

## 1. Account Information

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Account Registration (name(s) on account)

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Social Security Number or Tax ID

Account Number

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Phone

Email Address

## 2. Trusted Contact Information

By choosing to provide information about a trusted contact person, you authorize us to contact the trusted contact person listed below and disclose information about your account to that person in the following circumstances: to address possible financial exploitation, to confirm the specifics of your current contact information, health status, or the identity of any legal guardian, executor, trustee or holder of a power of attorney, or as otherwise permitted by FINRA Rule 2165 (Financial Exploitation of Specified Adults). Trusted contact must be 18 years of age or older.

- ☐ Add the following individual as trusted contact to my account
- ☐ Remove the following individual as trusted contact from my account

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Name

Date of Birth

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Phone

Email Address

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Address

City

State

Zip

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Relationship to Account Owner(s)

## 3. Authorization Signature (all account owners must sign)

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Signature

Date

Signature

Date

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Signature

Date

Signature

Date