

Trusted Contact Form



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

Overnight: Thornburg, 801 Pennsylvania Ave, Suite 219017, Kansas City, MO 64105

Phone 800.847.0200 | Fax 505.984.8973

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

Account Registration (name(s) on account)

Social Security Number or Tax ID

Account Number

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

Name

Date of Birth

Phone

Email Address

Address

City

State

Zip

Relationship to Account Owner(s)

3. Authorization Signature (all account owners must sign)

Signature

Date

Signature

Date

Signature

Date

Signature

Date