

**TRUSTED CONTACT PERSON INFORMATION FORM**

A Trusted Contact Person (TCP) is someone you authorize for us to get in touch with to help us protect your investments. Your TCP should be someone you trust to share information about you. They will have no authority to make investment decisions or ask us to provide details about you or your account.

Keep in mind a TCP is not the same as someone who can make decisions for you such as a person authorized under a Trading Authority (TA) or Power of Attorney (POA) (although you can select a person with TA or authorized under a POA as your TCP). We recommend adding someone who doesn't usually make decisions on your behalf.

We may contact your TCP to discuss:

- Concerns you might be a victim of financial exploitation including fraud, coercion or unauthorized transactions
- Concerns about your mental capacity as it relates to financial decision making
- The identity of your legal representative and/or your current contact information

**Take note:** Adding a TCP is optional. If adding one, be sure to let them know and go over when they might be contacted by us. You can (i) appoint more than one TCP (by completing an additional form) and (ii) remove your TCP at any time by getting in touch with us.

**A ACCOUNT DETAILS**

Legal Name of Client \_\_\_\_\_

**Accounts:**

Please list all of your personal investment accounts with BMO InvestorLine Self-Directed

Account #1	Account #2	Account #3	Account #4
_____	_____	_____	_____

**B TELL US ABOUT YOUR TRUSTED CONTACT PERSON**

Last name \_\_\_\_\_ First name \_\_\_\_\_ Middle initial \_\_\_\_\_

Relationship to applicant \_\_\_\_\_

**Provide all the contact information you have available for the Trusted Contact Person.**

Email address \_\_\_\_\_ Mobile phone \_\_\_\_\_ Home phone \_\_\_\_\_

Primary street address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country \_\_\_\_\_

**C CLIENT ACKNOWLEDGEMENT**

By signing below,

I hereby acknowledge the purpose of this authorization and confirm the information to be complete and accurate. I consent to BMO InvestorLine disclosing personal information and information about my account in the circumstances indicated herein to my trusted contact. Additionally, I agree to notify BMO InvestorLine should any changes occur in the information provided. I hereby release and discharge BMO InvestorLine, its employees and its affiliates from all claims, damages, losses, costs and expenses that may arise from, or relate to, the release of the information to my TCP.

I further acknowledge this authorization is not a power of attorney or trading authorization and does not authorize the TCP to make any investment decisions or transact any business with BMO InvestorLine on my behalf.

I consent to the designation of the TCP for all my current and future BMO InvestorLine Self-Directed accounts registered in my name. I also acknowledge that the trusted contact information provided on this form shall remain valid until such time as I revoke it by notifying BMO InvestorLine. Personal information collected on this form will be handled in compliance with BMO's Privacy Code available on [bmo.com/privacy](http://bmo.com/privacy).

Client name (please print) \_\_\_\_\_

Client signature \_\_\_\_\_ Date (DD-MMM-YYYY) \_\_\_\_\_