

Trusted Contact Person (TCP) Consent Form

Life events, planned or unplanned, can impact our vulnerability and our stress levels. The stress caused from these life events, combined with financial or economic events and physical (or mental) illness, has the potential to derail your financial plan.

It's important to have someone listed on your account who:

- Can support you during difficult times when you may struggle to retain, process or communicate pertinent information
- We can talk to if we're not able to get in touch with you, or to make inquiries about any of the following:
 - Suspected financial exploitation
 - Updating contact information should we not be able to reach you
 - Concerns about your capacity as it relates to financial decision-making
 - The identity of any legal guardian, executor, trustee or other personal or legal representative



90% of Canadians support the idea of appointing a trusted contact person to help protect their money.*

As a reminder, this person **does not** make any decisions on your behalf.



I would like to appoint a Trusted Contact Person (TCP).

TCP
CONTACT
INFO

First Name: _____ Last Name: _____

Email Address: _____ Phone: _____

Relationship to Client: _____

Client Name: _____ Signature: _____

Date: _____



*IIROC 2019. Awareness and Attitudes Related to Provisions to Protect Vulnerable Investors and Investment Firms/Advisors. The Canadian Mental Health Association – Toronto (CMHA) logo is used with the permission of CMHA. FOR INFORMATION PURPOSES ONLY. Bridgehouse Asset Managers® is a trade name of Brandes Investment Partners & Co. (Bridgehouse). The information has been gathered from sources believed to be reliable; however, Bridgehouse is not responsible for any errors or omissions contained herein. Bridgehouse assumes no liability for any loss or damage suffered as a result of the use or misuse of, or reliance on, the information and content herein. This material is not intended to provide legal, financial, medical or other advice, and may not reflect the thoughts and opinions of Bridgehouse. Information provided is not a substitute for professional advice. If you feel that you may need medical advice, please consult a qualified health care professional. FOR DISTRIBUTION TO INVESTORS BY REGISTERED DEALERS ONLY.