**Trusted Contact Designation for Authorized Individual**

A Trusted Contact Person (“Trusted Contact”) \* is a resource Schwab and Quantum Financial Advisors, may contact on your behalf, if necessary, to attempt to address concerns regarding potential financial exploitation, or in communicating with you regarding issues related to your account(s). A Trusted Contact will not be able to view your account information, execute transactions in your account(s), or inquire about account activity, unless that person has that authority through another role on the account(s), such as a trustee or power of attorney. Providing Schwab and Quantum Financial Advisors with Trusted Contact information is voluntary. We encourage you to provide two Trusted Contacts if one is not reachable in the future.

Schwab and Quantum Financial Advisors suggests that your Trusted Contact(s) be someone other than your financial consultant or investment advisor. The person(s) you name as Trusted Contact(s) will be the Trusted Contact(s) on all your Schwab and Quantum Financial Advisors accounts, as provided for in your account agreement. For multiple-party accounts, each party can name separate Trusted Contacts, and Trusted Contact(s) must be at least 18 years old.

**Trusted Contact Person 1** (If you have no changes to your existing Trusted Contact, please skip this section.)

**Name** *First Middle Last Suffix*

**Relationship** (Please select only one.) **Spouse Partner Child Parent Sibling Friend Other**

Please provide at least one method of contact for each Trusted Contact listed.

**Mailing Address** (No P.O. Boxes) **City**

**State or Province Zip or Postal Code** **Country**

**Telephone Number Mobile Phone Email Address**

**Trusted Contact Person 2** (If you have no changes to your existing Trusted Contact, please skip this section.)

**Name** *First Middle Last Suffix*

**Relationship** (Please select only one.) **Spouse Partner Child Parent Sibling Friend Other**

Please provide at least one method of contact for each Trusted Contact listed.

**Mailing Address** (No P.O. Boxes) **City**

**State or Province Zip or Postal Code** **Country**

**Telephone Number Mobile Phone Email Address**

\*If you provide a Trusted Contact Person(s) to Schwab and Quantum Financial Advisors, you understand that you have authorized Schwab and Quantum Financial Advisors to contact the Trusted Contact Person(s) at their discretion and to disclose information about your account to address possible activities that might indicate financial exploitation of you; to confirm the specifics of your current contact information, health status (including physical or mental capacity), or the identity of any legal guardian, executor, trustee, or holder of a power of attorney on your account(s); or as otherwise permitted by FINRA rules or state law. For more information, please see your Schwab and Quantum Financial Advisors Account Agreement, which is available at schwab.com/account agreement.