ForgeTrust

TRUSTED CONTACT PERSON OVERVIEW

Contact Center: (800) 248-8447 | www.ForgeTrust.com

ADD A TRUSTED CONTACT PERSON TO YOUR ACCOUNT

To help us better protect your account and provide an additional safeguard against potential fraud, financial exploitation, or communication challenges, Forge Trust encourages you to designate a Trusted Contact Person.

WHAT IS A TRUSTED CONTACT PERSON?

A Trusted Contact Person is someone Forge Trust may contact in limited circumstances to help address concerns about your account or your well-being.

- Your Trusted Contact cannot access your account, make transactions, or change account settings.
- This person is not a power of attorney or authorized representative.
- They serve only as a point of contact if Forge Trust suspects financial exploitation or is unable to reach you.
- We recommend selecting someone you trust, such as a family member, close friend, or professional advisor.
- Your Trusted Contact must be at least 18 years old.

WHAT YOU ARE AUTHORIZING

By providing a Trusted Contact, you authorize Forge Trust Co. to contact this person and disclose limited information when necessary, including:

- Verifying your current contact information
- Discussing concerns about potential fraud or financial exploitation
- Confirming your health status or ability to manage your account
- Identifying legal representatives (e.g., guardian, executor, or power of attorney)

This authorization does not grant the Trusted Contact control or authority over your account.

YOUR CONTROL

You may add, update, or remove your Trusted Contact at any time by submitting an updated form to Forge Trust.

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1. PERSONAL INFORMATION (*required field)

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* Last 4 Digits Only	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email* (Your personal email only)	

2. TRUSTED CONTACT PERSON INFORMATION (Required)

Please provide details for at least one Trusted Contact Person. This individual must be 18 years of age or older.

Action: ☐ Add a New Trusted Contact ☐ Update Existing Trusted Contact ☐ Remove Trusted Contact

Relationship to you: (Spouse, Child, Sibling, Friend, Advisor, etc.)

First Name	Middle Name	Last Name
Phone XXX-XXX-XXXX	Email (Your personal email only)	Date of Birth (MM/DD/YYYY)

Mailing Address			
City	State / Province	Zip / Postal Code	Country

3. ACKNOWLEDGMENT AND AGREEMENT

By signing below, I authorize Forge Trust Co. to contact the Trusted Contact Person listed above and to disclose limited information about my account solely for the purpose of:

- Addressing suspected financial exploitation
- Confirming my contact information or well-being
- Assisting in locating or communicating with me

I understand and agree that:

- My Trusted Contact Person cannot access my account, request transactions, or make decisions on my behalf
- This designation does not establish a fiduciary, agency, or power of attorney relationship
- I may revoke or update this designation at any time

Print Name	
Account Owner's Signature X	Date (MM/DD/YYYY)

Please sign and submit additional documents as required.

DELIVERY INSTRUCTIONS

Email
newaccounts@ForgeTrust.com

Fax
(650) 745-2902

Regular mail
Forge Trust Co.
PO Box 2048
San Francisco, CA 94126

Overnight mail
Forge Trust Co.
4 Embarcadero Ctr, Floor 15
San Francisco, CA 94111

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