



- TD Direct Investing. Please return to a TD Canada Trust location and fax to 1 877 639-4547
- TD Wealth Financial Planning
- TD Wealth Private Investment Advice

Account Number(s) : \_\_\_\_\_

I authorize TD Waterhouse Canada Inc.<sup>1</sup> and its authorized representatives (collectively “You”) to contact, make inquiries, discuss concerns and disclose certain personal information about me and my account(s) to the trusted contact person ("TCP") named below, should one of the following situations arise:

- You have concerns that I may be the subject or target of financial exploitation;
- You observe signs of diminished mental capacity, which may affect my ability to make financial decisions;
- You require the name and contact information of my legal representative (e.g. lawyer, attorney, power of attorney, Curator, etc.); or
- You are unable to reach me, and You seek to confirm my current contact information.

**Trusted Contact Person(s):**

	Trusted Contact Person #1	Trusted Contact Person #2 (optional)
Name		
Telephone Number		
Relationship to Account Owner		

**I understand that further details on the use of my TCP and application of a Temporary Hold, can be found in the Relationship Disclosure Document applicable to my account.**

I understand and agree that:

**TCP:**

- My TCP is someone that I trust, is mature and has the ability to communicate and engage with You in conversations about my personal circumstances if You contact them.
- This Form does not provide my TCP with legal authority to act on my behalf. My TCP will not be permitted to execute transactions or make financial decisions for me, unless they are also my legal representative with authority to do so.
- It is strongly recommended that I name someone other than my legal representative as my TCP.
- I may revoke my consent or change my TCP but I must do this by contacting You and completing the necessary process.
- I should tell my TCP that I provided You with their contact information for these purposes.

**Disclosing my information:**

- You will only disclose information that is necessary to discuss Your concerns about me and assist me in the situations identified above. This could include, but is not limited to, medical information, details of my personal life, financial holdings and transactions. I consent to such disclosure.

<sup>1</sup>TD Waterhouse Canada Inc. is a subsidiary of The Toronto-Dominion Bank.

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**Temporary Holds:**

- You may place a temporary hold on transactions and/or on my account(s) for the time that is necessary to address the situation and concerns about me.
- You will notify me if You place a temporary hold. You may contact my TCP and my legal representative, if any, in such circumstances.

**Consent and Disclaimer**

- I consent to You contacting my TCP.
- You *may* contact my TCP, but You are not obligated to do so and will not be held responsible for not contacting my TCP.

\_\_\_\_\_  
Client Name

\_\_\_\_\_  
Signature

Date: \_\_\_\_\_  
(MM/DD/YYYY)