

The trusted contact person (herein "TCP") is a resource intended to:

- Help National Bank Direct Brokerage (NBDB) to protect my interests or financial assets in response to possible financial exploitation or concerns about my mental capacity.
- Confirm or provide to NBDB the name and contact information of my legal representative, in particular my legal guardian, the executor/liquidator of my estate or the trustee of a trust of which I am the beneficiary.
- Validate and obtain my current contact information in the event NBDB can no longer reach me, especially after several attempts.

The TCP does not replace my attorney appointed under a power of attorney nor does the TCP assume this role. The TCP also does not have the authority to trade in my account(s) or make other decisions on my behalf.

I authorize NBDB to communicate with the TCP(s) designated below in the situations where NBDB:

- Becomes concerned about my capacity to make financial decisions in my best interest or my capacity to understand information.
- Suspects possible financial exploitation.
- Tries to reach me unsuccessfully, after several attempts.
- Tries to obtain the name and contact information of my legal representative, if necessary.

The purpose of this communication will be to allow NBDB to share its concerns with the TCP, validate them with the TCP and provide the TCP the necessary information so that I can get the help I may require. If applicable, the TCP could provide NBDB with the identity and contact information of any person I have designated to represent me in the event of incapacity, any trustee of a trust of which I am beneficiary or any executor/liquidator of an estate of which I am a beneficiary.

This consent is valid until updated or expressly revoked by written notice from me addressed to NBDB. I can change the designation of the TCP(s) at any time by completing a new form.

This consent applies to the following account(s) and to any other current and future account I hold with NBDB whose number(s) begins with the following six characters: _____.

Trusted contact person(s)

It is recommended that the TCP be of the age of majority.

I hereby authorize NBDB to communicate with the following person(s):

First Name and Family Name Telephone Number (Primary)

Relationship Email

Address (including City, Postal Code and Province)

First Name and Family Name Telephone Number (Primary)

Relationship Email

Address (including City, Postal Code and Province)

In witness whereof, I have signed at _____, on _____.
(Place) (Date)

Client's Name (in block letters) **X**
Signature