

## Trusted Contact Person

### What is a Trusted Contact Person?

A trusted contact person is someone who you can trust to act in your best interest. We will contact this person if there is any unusual situation occurs. This person must be at least 18 years old and may be a family member, significant other, or personal attorney. Adding a Trusted Contact Person can help protect you and your account.

### When would Integral Financial LLC reach out to a Trusted Contact Person?

We may contact a Trusted Contact Person in one of the following situations:

- To determine possible or suspicious financial exploitation issues involving your account
- To confirm your contact information if we cannot reach you
- To confirm if there is someone acting as a legal guardian, an executor, a trustee or holder of a power of attorney
- To check if your mental or physical health status is good

A Trusted Contact Person won't be able to obtain account information or trade on behalf of you. We will contact this person only if one of the scenarios above is present. We will not inform this individual that they are Trusted Contact Person on your account. If you inform your Trusted Contact Person of their designation, they will be able to alert us to one of the possible scenarios presented above.

### Why should I add a Trusted Contact Person to my account?

Adding a Trusted Contact Person is another way of protecting your account when something unexpected happens in your life. It adds an additional level of security to your account. A Trusted Contact Person is not the same as your Power of Attorney (POA). This helps us address suspicious financial exploitation. A Trusted Contact Person is another resource to help protect you and your loved ones against financial abuse or scams.

### How do I add or update a Trusted Contact Person to my account?

Contact us today to add a Trusted Contact Person to your account. When you add a Trusted Contact Person, this person will serve as the trusted contact for all accounts with Integral Financial LLC.

### What kind of information do you need for a Trusted Contact Person?

- Full Name
- Physical address
- Phone number or email address