

# Is your financial advisor asking you for a Trusted Contact Person?



FINANCIAL AND  
CONSUMER SERVICES  
COMMISSION OF  
NEW BRUNSWICK

Your registered financial advisor is required to ask you to name a Trusted Contact Person (TCP). There are a number of very important reasons to appoint a TCP.



## What is it?

A TCP is a person you authorize your financial firm to contact in limited circumstances.

## Why have one?

A TCP can help your registered financial advisor help you, if needed.

## Who should have one?

We suggest a TCP for anyone who has an investment account.

## How would having a Trusted Contact Person help me?

Maybe your registered financial advisor needs to get in touch with you but can't when:



You are travelling



There is a natural disaster



There is a concern about fraud



You are having a health issue



Your TCP cannot authorize transactions on your behalf.



Your TCP cannot make decisions about your account.



Being a TCP does not make them a power of attorney, legal guardian, trustee or executor.

Talk with your registered financial advisor today about naming a Trusted Contact Person.

Adapted with permission of the Canadian Securities Administrators.

This brochure is provided for information purposes only. The Commission does not provide financial or legal advice, or endorse any products or services.

[Finances50plus.FCNB.ca](https://Finances50plus.FCNB.ca)



December 2024