

## Trusted Contact Authorization Form

### 1. Account Owner Information

Name \_\_\_\_\_  
Last
First
Middle
Date of Birth \_\_\_\_\_

Address \_\_\_\_\_  
City
State
ZIP
Employer \_\_\_\_\_

E-Mail \_\_\_\_\_ Social Security No. \_\_\_\_\_  
Phone ( \_\_\_\_\_ ) \_\_\_\_\_

### 2. Trusted Contact Definition

A "Trusted Contact" is a person, at least 18 years of age, that would be authorized to be contacted by WEA Member Benefits in the event we have trouble reaching you or have reasonable belief that you and your account are being exploited financially. WEA Member Benefits recommends that you choose someone who does not have any ties to your account/money upon your passing. The Trusted Contact can be a Trustee, Executor, Power of Attorney, or multiple people. The "Trusted Contact" will not have any power to make financial changes to your account.

If you would **not** like us to discuss any of the following topics with the Trusted Contact, please check the corresponding box.

- Unable to contact you/update contact information.
- Financial exploitation on your account.
- Health status of the account owner.

### 3. Trusted Contact Information

Name \_\_\_\_\_  
Last
First
Middle
Phone ( \_\_\_\_\_ ) \_\_\_\_\_

Address \_\_\_\_\_  
City
State
ZIP
E-Mail Address \_\_\_\_\_

Relationship to Account Owner \_\_\_\_\_  
Gender:  Male  Female

### 4. Signature and Date (Required)

I am choosing to provide WEA Member Benefits authorization to contact the Trusted Contact person listed above to discuss and obtain information regarding health status, financial exploitation, specifics of current contact information, identity of legal guardian, executor, trustee, power of attorney, and any other information that may be used to protect the welfare of my account in extraordinary situations as stated previously. I am also stating that the designation of "Trusted Contact" alone will not have any authority over my accounts and will act in an informational capacity.

\_\_\_\_\_  
Account Owner Signature

\_\_\_\_\_  
Date