

## RBC Direct Investing Inc. Trusted Contact Person (TCP) Authorization Form

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

Client Account<sup>[1]</sup> Number(s): \_\_\_\_\_

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You may provide us<sup>[2]</sup> with the name and contact information of a person(s) you trust to assist us in protecting you from financial exploitation or if there are concerns about your mental capacity as it relates to your account(s) with us. By completing this form, you consent and agree to the following:

**Who should you designate as your TCP(s)?** Preferably choose someone you trust who is:

- Mature (regardless of age) and able to conduct potentially difficult conversations about your personal situation.
- Not involved in making investment decisions or transactions with respect to your account(s).
- In addition to and separate from a Power of Attorney or Trading Authority on your account(s).

You agree that you will notify your TCP(s) that you have named them as such, obtain their consent to share their personal information with us and submit a new authorization form if you do not obtain their consent.

**Can you change your TCP(s)?** You may change or remove your TCP(s) by submitting a new authorization form, which will replace or revoke any prior designation.

**When may we contact your TCP(s)?** We may contact your TCP(s) at our discretion in relation to your current or future account(s) with us regarding the following only:

- Our concerns about possible financial exploitation affecting you.
- Our concerns about your mental capacity as it relates to decisions involving financial matters.
- Accuracy of your contact information.
- Name and contact information of your legal representative (if any).

You will release us from all claims, causes of action, damages, losses, expenses, costs, and liabilities, direct or indirect, of any kind that may arise out of, relate to, or are in connection with us contacting or failing to contact your TCP(s).

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1. This TCP Authorization Form applies to all current and future account(s) with us.  
2. "We", "us", or "our" refers to RBC Direct Investing Inc<sup>®</sup>.

**RBC Direct Investing Inc.  
Trusted Contact Person (TCP) Authorization Form**

**TRUSTED CONTACT PERSON 1**

_____ FIRST NAME		_____ LAST NAME		_____ RELATIONSHIP TO ACCOUNT HOLDER	
_____ MAILING ADDRESS			_____ CITY	_____ PROVINCE	_____ POSTAL CODE
_____ COUNTRY		_____ TELEPHONE		_____ EMAIL ADDRESS	

**TRUSTED CONTACT PERSON 2 (OPTIONAL)**

_____ FIRST NAME		_____ LAST NAME		_____ RELATIONSHIP TO ACCOUNT HOLDER	
_____ MAILING ADDRESS			_____ CITY	_____ PROVINCE	_____ POSTAL CODE
_____ COUNTRY		_____ TELEPHONE		_____ EMAIL ADDRESS	

If you wish to withdraw your consent for us to contact your TCP(s) which you have previously provided to us, and do **not** wish to name replacement TCP(s) please leave the above TCP designation section(s) blank, print your name, date, and sign the form and return the form to the address below.

To view and update your current contact information electronically, login to your RBC Direct Investing account and select "Edit Profile and Preferences" under "My Portfolio".

Once completed, submit by mail, fax, or drop off at any RBC Royal Bank branch:

RBC Direct Investing Inc.  
Royal Bank Plaza  
200 Bay Street, North Tower  
P.O. BOX 75  
Toronto, Ontario M5J 2Z5

Fax: 1-888-722-2388  
Tel: 1-800-769-2560

\_\_\_\_\_  
PRINT CLIENT'S NAME

\_\_\_\_\_  
CLIENT'S SIGNATURE

\_\_\_\_\_  
DATE (MM/DD/YYYY)

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