

# Adding a Trusted Contact Person to your account

## What

A trusted contact is **someone who you can rely on to be a point of contact if needed**. Naming someone as a trusted contact does not give that person any authority to act on your behalf or transact on your account(s). They will serve as a contact on your account should a situation concerning your welfare arise. This person must be at least 18 years old and may be a family member, significant other, close friend or personal attorney.

## Why

A trusted contact can help your firm connect with you when there are concerns related to your account should you be unable to be reached due to travel, relocation, or health issues. A trusted contact is someone we can reach in the event we're concerned about your health, well-being, or welfare (due to exploitation, endangerment, or neglect).

By designating a trusted contact, you are authorizing the firm to contact someone you trust and discuss your welfare in limited circumstances. A trusted contact may be asked to confirm your current contact information, health status or the identity of any legal guardian, executor, trustee or holder of a power of attorney.

## How

Speak with your advisor or login to your Ameriprise.com account today to add a Trusted Contact Person to your profile.

## Resources

- FINRA – Establishing a Trusted Contact  
**Web:** <https://www.finra.org/trustedcontact>
- Protecting seniors from financial exploitation  
**Web:** <https://www.finra.org/investors/insights/senior-financial-exploitation>  
**Phone:** 844-574-3577
- SEC Investor Bulletin  
**Web:** <https://www.investor.gov/introduction-investing/general-resources/news-alerts/alerts-bulletins/investor-bulletins-trusted-contact>
- Contact the Ameriprise home office  
**Phone:** 800-862-7919
- Contact your financial advisor today  
**Web:** <https://www.ameripriseadvisors.com/>