



Trusted Contact Person Form

John Marshall Bank encourages you to designate a trusted contact person by completing this form.

What is a Trusted Contact Person?

A trusted contact person(s) is an individual (age 18 or older) identified by you, whom JMB could contact and disclose information about your account:

- to address possible financial exploitation.
- to confirm specifics of your current contact information, health status, or the identity of any legal guardian, executor, trustee, or holder of a power of attorney; or
- as otherwise permitted by Financial Industry Regulatory Authority Rule 2165 (Financial Exploitation of Specified Adults).

Please accept this document as instructions to add a trusted contact person(s) to the accounts at John Marshall Bank for which I am either account owner or an authorized person.

Name of Account Owner (first, middle and last)	
Account Numbers:	

A trusted contact person(s) is an individual (age 18 or older) identified by you, whom John Marshall Bank could contact and disclose information about your account:

- to address possible financial exploitation.
- to confirm specifics of your current contact information, health status, or the identity of any legal guardian, executor, trustee, or holder of a power of attorney; or
- as otherwise permitted by Financial Industry Regulatory Authority Rule 2165 (Financial Exploitation of Specified Adults).

Primary Trusted Contact Person Information

Name of trusted contact person (first, middle and last)	
Relationship (e.g., spouse, child, holder of my power of attorney, lawyer, accountant, etc.)	
Street Address City, State, Zip	
Work phone	
Home phone	
Mobile phone	
Email	



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Alternate Trusted Contact Person Information

Name of trusted contact person (first, middle and last)	
Relationship (e.g., spouse, child, holder of my power of attorney, lawyer, accountant, etc.)	
Street Address City, State, Zip	
Work phone	
Home phone	
Mobile phone	
Email	

I understand that (1) I may designate multiple trusted contact persons (use additional copies of this form); (2) John Marshall Bank is not required to contact my trusted contact person(s) but may at their discretion contact one or more of the people I have designated as trusted contact person(s); (3) the completion of this form is optional and I may withdraw it at any time by notifying John Marshall Bank in writing as shown on my account statement. If I would like to change my trusted contact person, I may do so by providing John Marshall Bank with a newly signed Trusted Contact Person Form with the box checked below to indicate that the new form supersedes any previous form(s).

Check here if this Trusted Contact Person Form supersedes previous Trusted Contact Person Form(s)

Signature

Printed Name	Date
Signature of Customer	Date

For Internal Use Received By: Date:
