

Trusted Contact Disclosure Document

In order to comply with new industry regulations (FINRA Rule 4512), Fidelity is asking clients for trusted contact information.

A trusted contact is someone who we can get in touch with and disclose information about your account to address possible financial exploitation, 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.

Upon account opening, you will be presented with a few next steps to complete your account set-up. You will be provided the opportunity to add your trusted contact in that final account setup.

To learn more, go to <https://www.fidelity.com/trustedcontact> or contact a Fidelity representative.

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