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Trusted Contact Authorization

Client authorizes Storen Legacy Partners, LLC (“SLP”), to contact and disclose any information and/or documents related to the assets under management in the event that SLP is unable to reach the Client or SLP has concerns about the Client’s mental or physical health, well-being, safety, or potential financial exploitation. By completing and signing this form, SLP may disclosed to the Trusted Contact(s) listed below any concern relating to the Client’s health, well-being, and financial condition, and may duplicate and share information related to the Assets in the Client’s name including, but not limited to, Client’s current contact information, official correspondence from SLP, withdrawal patterns, tax ramifications, balances and positions, lapse or termination of policies for non-payment of premiums, and the identity of any legal guardian, executor, trustee or holder of a Power of Attorney. A Trusted Contact is not authorized to make decisions or transact on the Client’s behalf with respect to the Client’s account(s) managed by SLP. SLP recommends designating more than one Trusted Contact when possible.

Despite any authorization granted herein, Client acknowledges that SLP is not required to contact the Trusted Contact at any time. Client agrees to defend, indemnify, and hold SLP harmless from all losses, liabilities, damages, suits, claims, expenses, and costs (including attorney’s fees and expenses) paid, suffered or incurred in connection with or arising out of (a) any action SLP takes, or omits to take, to contact the Trusted Contact and (b) any action taken by SLP or the Trusted Contact in investigating and addressing a situation involving the Client’s financial well-being unless such decision or action was the result of gross negligence, willful misconduct or bad faith. Client acknowledges that this consent is voluntary and will remain in effect indefinitely unless Client revokes it. Client may revoke this consent at any time by providing SLP with written notice; however, doing so will not affect the legal effectiveness, validity, or enforceability of any action SLP has taken in reliance on the Client’s previously granted consent.

TRUSTED CONTACT #1

Name:	
Relationship:	
Primary Phone:	
Email:	

TRUSTED CONTACT #2 *(optional, but recommended)*

Name:	
Relationship:	
Primary Phone:	
Email:	

☐ I decline to provide a trusted contact.

Client Name:			
Client Signature:		Date:	

Securities offered through Simplicity Investments, Member FINRA/SIPC. Investment advice offered through Storen Legacy Partners, a registered investment advisor. Tax/accounting/CPA related services offered through Storen Tax & Financial Group Inc. DBA Storen Financial. Storen Tax & Financial Group Inc. is a separate legal entity and not affiliated with Simplicity Investments. Simplicity Investments does not offer tax advice or Tax/accounting/CPA related services. Storen Legacy Partners and Storen Financial are separate entities from Simplicity Investments.