



Instructions for BAC Community Bank Customer:

You should give this form to your Trusted Contact Person



YOU'RE MY TRUSTED CONTACT PERSON

I have appointed you as my Trusted Contact Person for my accounts at BAC Community Bank.

If you are not comfortable acting as my Trusted Contact Person, please let me know.

WHAT YOU SHOULD DO IF YOU ARE CONTACTED

BAC Community Bank may ask you questions about me.

The information you provide may assist them in protecting my accounts or investments. The conversation may raise topics that are difficult in nature.

You can answer their questions to the best of your ability,

although you are under no obligation to do so. If you don't know the answer or wish not to answer, it's okay to say so.

You may also involve law enforcement, elder abuse

organizations or government agencies such as Adult Protective Services if there are concerns about financial exploitation or abuse.

MAKE SURE THE PERSON YOU ARE TALKING TO IS FROM BAC COMMUNITY BANK

If you are unable to verify that an unsolicited call is legitimate, hang up. Use the information in this handout to call BAC Community Bank directly.

THE ROLE OF A TRUSTED CONTACT PERSON

As my Trusted Contact Person, you may be asked to assist BAC Community Bank in protecting my accounts.

You may know more about my personal situation, my family dynamic or my health information. You may be asked questions about me if there are concerns about financial exploitation or diminished mental capacity, or if there is an emergency.



A Trusted Contact Person cannot make financial decisions or account changes. An individual named as a Trusted Contact Person is not a legal representative, guardian or trustee.

BAC Community Bank

1-877-226-5820

www.bankbac.com/trustedcontact

Member FDIC