

Account Number(s): _____

Naming a Trusted Contact Person gives you the opportunity to designate a person to be your advocate when personal circumstances arise, such as a change in health, capacity, or availability, or observations of changes in your financial activity or behavior.

This form is not a Power of Attorney; the named individual CANNOT change account ownership or address, complete withdrawals, or effect other transactions on your account.

Account Owner's Name: _____

By signing this form, I give Omega FCU permission to contact the individual identified below as my Trusted Contact Person in the event of a situation described below regarding any or all accounts I have with Omega FCU.

If Omega FCU has questions or concerns about my health (capacity and well-being, etc.) or welfare (endangerment, self-neglect, or financial exploitation, etc.), or is unable to contact me, it may:

- Contact and provide information about me and my account(s) to the individual I identified below as my Trusted Contact Person
- Confirm with my Trusted Contact Person whether another individual or entity has been given legal authority to act for me (for example, an agent to whom I've given power of attorney, a successor trustee of a trust for which I'm trustee, or a court-appointed guardian, conservator, or executor); and
- Communicate with individuals who claim legal authority for me and determine the legitimacy of their legal claim.

I understand that: (1) I authorize Omega FCU to contact my Trusted Contact Person for the designated account(s) I may have with Omega FCU; (2) Omega FCU is not required to contact, or attempt to contact, my Trusted Contact Person; (3) this Authorization is optional, and I may withdraw it at any time by notifying Omega FCU in writing; (4) I may change or amend my Trusted Contact Person at any time by providing Omega FCU a newly signed Trusted Contact Person Authorization form, and that this new form will supersede any previous form on file; and (5) the named Trusted Contact Person must be 18 or older.

Name of Trusted Contact Person (Note: Should not be a co-owner of your account)_____
Relationship (e.g., Spouse, Neighbor, Sibling, Lawyer, Accountant, etc.)_____
Phone Number(s)_____
E-Mail(s)_____
Address_____
City_____
State_____
Zip Code

The undersigned hereby agrees to indemnify Omega Federal Credit Union, and its parent, subsidiaries, and affiliates, and their respective past and present officers, directors, employees, and agents against any and all loss, liability, claim, damage, or expense (including, without limitation, judgments, amounts paid in settlement, and attorney's fees) arising out of or relating to providing information to the Trusted Contact Person or any related activity.

Please note that this form represents an individual account owner release and that each account owner should sign.

Member's Printed Name_____
Member's Signature_____
Date_____
Member's Printed Name_____
Member's Signature_____
Date

Return to: **Omega Federal Credit Union**
PO Box 15038
Pittsburgh, PA 15237-0038

Phone: 412-369-3800
Toll Free: 800-496-8728
Fax: 412-369-3828
E-Mail: ofcumembers@omegafcu.com

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Trusted Contact Program Information Sheet

What is a trusted Contact Person?

A Trusted Contact Person is a person you designate that Omega FCU may contact if Omega FCU is concerned you are experiencing fraud, a health crisis, or another emergency that affects your financial affairs. You should choose someone you trust who is reliable and has your best interests at heart. You can choose a family member, friend, attorney, or someone else. Consider choosing multiple trusted contacts, in case the first person is unavailable or is involved in a suspicious situation.

When will Omega FCU contact my Trusted Contact Person?

Omega FCU *may* (but is not required to) contact your Trusted Contact Person under the following circumstances:

- Omega FCU has questions or concerns about your health (capacity and well-being, etc.), your welfare (endangerment, self-neglect, etc.), or possible financial exploitation or fraud;
- Omega FCU needs to confirm your contact information;
- Omega FCU needs to confirm the identity of a new individual or entity that has been given legal authority to act for you (for example, an agent to whom you have given power of attorney, a successor trustee of a trust for which you are a trustee, or a court-appointed guardian, conservator, or executor); or
- Omega FCU cannot contact you.

What will Omega FCU provide to my Trusted Contact Person?

If any of the above circumstances occur, Omega FCU *may* contact and provide information about you and your account(s) to Trusted Contact Person. However, if Omega FCU suspects that the Trusted Contact Person may be involved in the fraud or financial exploitation, it will not contact the Trusted Contact Person.

Do I have to designate a Trusted Contact Person?

Authorizing a Trusted Contact Person is optional. However, given the increase in fraud and financial exploitation, the Consumer Financial Protection Bureau and other regulatory agencies protect consumers. Most consumers support the concept of a Trusted Contact Person. Ultimately, however, it is your decision whether or not to appoint a Trusted Contact Person.

What if I change my mind or want to change my Trusted Contact Person?

You can always revoke your decision to have a Trusted Contact Person. You can also change your Trusted Contact Person at any time by filling out a new form, which will replace and supersede any previous form.