



bankofthewest.com
1.800.338.3919

TRUSTED CONTACT FORM

- Use this form to add a Trusted Contact to your BWIS (BancWest Investment Services) accounts. This form covers all BWIS accounts
- A Trusted Contact is a person that you are permitting BWIS to contact and to disclose information to about your account. This is intended to be a resource for BWIS in administering your account, protecting assets, and responding to possible financial exploitation. Examples include to confirm your contact information, health status, the identity of any legal guardian, executor, trustee, or holder of a power of attorney, or in other cases permitted by applicable rules
- Adding a Trusted Contact allows us to contact this person on your behalf if it becomes necessary, but they will not be able to view your account information, execute transactions in the account, or inquire about any account activity
- Adding a Trusted Contact only covers you as the Account Holder. For accounts with Additional Account Holders, a separate form should be completed
- **Note: Naming a Trusted Contact is optional**
- Any Trusted Contact must be at least 18 years old
- For more information about completing this form, please contact us

About You

Name (First Middle Last) Social Security Number

About Your Trusted Contact(s)

	Name (First Middle Last)	Name (First Middle Last)	
Please check one	Their Relationship to You <input type="checkbox"/> Spouse <input type="checkbox"/> Partner <input type="checkbox"/> Parent <input type="checkbox"/> Child <input type="checkbox"/> Sibling <input type="checkbox"/> Friend <input type="checkbox"/> Other	Their Relationship to You <input type="checkbox"/> Spouse <input type="checkbox"/> Partner <input type="checkbox"/> Parent <input type="checkbox"/> Child <input type="checkbox"/> Sibling <input type="checkbox"/> Friend <input type="checkbox"/> Other	

Legal Street Address Legal Street Address

City State Zip City State Zip

Home Phone Home Phone

Work Phone Work Phone

Cell Phone Cell Phone

Email Address Email Address

Please provide as much contact information as possible for each Trusted Contact. AT LEAST ONE METHOD OF CONTACT must be included for each Trusted Contact.

Account Holder Authorization and Signature

I understand that I am designating a Trusted Contact(s), and in doing so am authorizing BancWest Investment Services (BWIS) and its affiliates to share financial information, including non-public personal information, relating to my accounts with the Trusted Contact(s) listed at the sole discretion of BWIS. This authorization applies to any current or future accounts I maintain at BWIS.

I understand this is optional, and that there is no requirement that BancWest Investment Services (BWIS) contact my Trusted Contact.

I understand I may withdraw this Trusted Contact authorization at any time by notifying BWIS via telephone or in writing.

I understand that my designated Trusted Contact(s) will not have the power to act on my behalf as an agent or to make decisions regarding my finances, unless otherwise legally authorized to do so.

By signing below, I along with my heirs agree to indemnify and hold BWIS harmless if they contact, or fail to contact, my Trusted Contact(s).

Signature Needed

Please sign and date, use blue or black ink

Account Holder Signature _____
Today's Date (mm/dd/yy)

Printed Name (First Middle Last)

Instructions

- Completed forms and documentation may be returned using one of the following methods:
- Fax to 1.877.323.4540
 - Take to your nearest Bank of the West branch
 - Mail to: BancWest Investment Services, 13220 California Street – 2nd floor, Omaha, NE 68154

For BWIS Use Only: Do Not Write Below This Line
Comments

Rep Name/ID Date

BankWest Investment Services is a wholly owned subsidiary of Bank of the West. Bank of the West is a wholly owned subsidiary of BNP Paribas. Investment and Insurance Products:	
NOT FDIC INSURED	NOT BANK GUARANTEED
MAY LOSE VALUE	NOT A DEPOSIT
NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY	