



BCP Asset Management Trusted Contact Person (TCP) Consent Form

1. Purpose of this Form

This form allows you, as a personal consumer of BCP Asset Management ("BCP"), to nominate a **Trusted Contact Person (TCP)**. A TCP is someone BCP may contact **in limited circumstances** to support you and help reduce the risk of harm.

A Trusted Contact Person: - is **not a legal representative**; - **cannot make decisions** or give instructions on your behalf; - does **not have authority** over your investments.

2. Circumstances in Which BCP May Contact a Trusted Contact Person

BCP may, at its discretion, contact your Trusted Contact Person only where: - BCP has concerns about possible **financial abuse, fraud or scams**; - BCP is experiencing **difficulty communicating with you**; - BCP needs to confirm: - your current contact information; - your health status at a high level; - the identity of any appointed legal guardian, executor or decision-making assistant.

Where necessary and proportionate, BCP may discuss **confidential information** with the Trusted Contact Person **solely for the purpose of addressing the relevant matter**.

3. Details of the Trusted Contact Person

Full Name:

Relationship to You (optional):

Telephone Number:

Email Address:

4. Data Protection Notice

BCP Asset Management will process personal data in accordance with applicable data protection legislation. Personal data will be retained only for as long as necessary to fulfil the purposes outlined in this form.

Further information on how BCP processes personal data is available in BCP's Privacy Notice.

5. Personal Consumer Consent

I confirm that: - I wish to nominate the person named above as my Trusted Contact Person; - I understand the role and limitations of a Trusted Contact Person; - I give my **written consent** for BCP Asset Management to: - retain the Trusted Contact Person's name and contact details; - contact the Trusted Contact Person in the circumstances outlined in Section 2; - **discuss confidential information about me** with the Trusted Contact Person, where necessary, for the purpose of addressing those matters.

I understand that: - BCP is not obliged to contact my Trusted Contact Person; - I may withdraw or change my Trusted Contact Person at any time by notifying BCP in writing; - Any formal legal decision-making arrangement will take precedence over this nomination.

Client Name (1):

Client Signature (1):

Date:

Client Name (2):

Client Signature (2):

Date:

6. Trusted Contact Person Consent

I confirm that: - I agree to act as a Trusted Contact Person for the above-named client; - I understand that I am **not authorised** to make decisions or transact on the client's behalf; - I give my **written consent** for BCP Asset Management to: - retain my name and contact information for the purposes described above; - contact me in the circumstances outlined in Section 2; - discuss the matters referred to in Section 2, including relevant confidential information, with me.

I understand that: - My involvement is limited to supporting communication and safeguarding the client; - I may be contacted only where BCP considers it appropriate and proportionate; - I may withdraw my consent at any time by notifying BCP in writing.

Trusted Contact Person Name:

Signature:

Date:

BCP Internal Use

Date Received:

Recorded by: