Video: Designating a Trusted Contact

Hello. I am Rodnee Warr with Wells Fargo Wealth and Investment Management. Your financial advisor is required to ask you about designating a trusted contact. Let me explain why.

Circumstances can arise where your financial advisor needs to reach you, but cannot. Displacement by natural disaster; suspected fraud on your account; or a health emergency. These scenarios can create disruptions and you need to be protected.

Adding a trusted contact to your account is the safe thing to do. This is someone who can help answer basic questions about your medical status, how to reach you, or the identities of those closest to you. A trusted contact does not have authority over your account. It is not a power of attorney or a legal guardian.

Through my work supporting elders and vulnerable adults, I know personally how important this can be. So take action. Ask your financial advisor today how you can add a trusted contact to your account.

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