



Account Details

Form fields for Primary Account Holder Name, Joint Account Holder Name, and three Client ID fields.

Note: Your Client ID is found in the first page of your Qtrade Guided Portfolios ("QGP") account statement. Please note that the Trusted Contact Person information will apply to all registered and non-registered accounts associated with the Client ID.

Appoint a Trusted Contact Person

Trusted Contact Person

When you open an account or update your information, you may appoint a Trusted Contact Person ("TCP"). A TCP may be a close friend, family member or caregiver that can be trusted to ensure that your interests come first.

Qtrade Guided Portfolios may place a temporary hold on the purchase or sale of a security or on the withdrawal or transfer of cash or securities from your Account, where we reasonably believe that financial exploitation has occurred.

Appointment

I hereby revoke any appointment of Trusted Contact Person made by me for this Client ID Number and I hereby appoint the person named below as my Trusted Contact Person. I authorize you to contact, discuss concerns and disclose personal information about me to my Trusted Contact Person.

Would you like to add a Trusted Contact Person to your account? [] No [] Yes If yes, complete the following information:

Form fields for Trusted Contact First Name, Last Name, Relationship to You, Phone Number, and Email Address.

Account Holder Authorization (Read Carefully Before Signing)

By signing and dating below, I acknowledge, agree, and consent to all of the foregoing and confirm that the information I have provided is correct.

Signature and date fields for Account Holder.

Signature and date fields for Joint Account Holder.