

Trusted Contact Person

We encourage you to designate a Trusted Contact Person (“TCP”) for your IBKR account. A TCP is someone who is at least 18 years old who you authorize IBKR to contact if IBKR is concerned that you may be the victim of financial exploitation or experiencing mental or physical impairment that is affecting your ability to manage your account. Designating a TCP on your account is also useful for other reasons. For example, if IB has been unable to contact you after multiple attempts, we could contact your designated TCP to obtain your current contact information.

- Designating a TCP on your account is solely your decision and is optional. Only accountholders can add, update, or remove a TCP on their account.
- **Adding a TCP does not give that person access to your account. It is simply someone we can call if you are unavailable or we have reason to believe that you are incapacitated.**
- **A TCP will not be able to view your account information, execute transactions in your account, or inquire about account activity.**
- However, by designating a TCP, you authorize IBKR (and your advisor or introducing broker if you have one) to contact the TCP in IBKR’s discretion and to disclose to the TCP any information in IBKR’s possession about you and your account, including financial information, your identity and contact information, the identity of any legal guardian, executor, trustee or holder of power of attorney, and facts regarding the circumstances that have caused IBKR to contact the TCP for assistance, or as otherwise permitted by FINRA Rule 2165.
- Designating a TCP does not ensure that financial exploitation will not be attempted or occur and does not obligate IBKR to contact the TCP. By accepting this disclosure, you waive any claim for loss or damages against IBKR arising out of or relating to IBKR contacting (or not contacting) your designated TCP.