

1. Client Information	
Client A Name:	Client B (if applicable) Name:
2. Trusted Contact/Diminished Capacity Authorization (REQUIRED)	
<p>This authorization allows Grimes to contact and, if necessary, share account information with a third-party in the unfortunate event of your death, disability, perceived diminution in your cognitive ability, if there are questions or concerns regarding financial exploitation or abuse, or the inability to contact you after several repeated attempts over an extended period of time. It is not a substitute for a Power of Attorney document and does not grant us authorization to accept trade, disbursement, or any other instructions from the authorized individual(s).</p>	
Client A – Authorization for Client B Check here to authorize Client B listed in Section 1. Additional third-parties can be listed below.	Client B – Authorization for Client A Check here to authorize Client A listed in Section 1. Additional third-parties can be listed below.
Additional Trusted Contact/Diminished Capacity Authorizations	
(1) Name: Relationship: (e.g. CPA, attorney, child, etc.) Address: Telephone: Email:	(2) Name: Relationship: (e.g. CPA, attorney, child, etc.) Address: Telephone: Email:
3. Important Disclosures – Grimes & Company (“Grimes”)	
<p>By completing this form and signing below, you hereby authorize Grimes to contact and, if necessary, share information pertaining to you and your accounts with such individual(s) in the event of your death, disability, perceived diminution in your cognitive ability, if there are questions or concerns regarding financial exploitation or abuse, or the inability to contact you after several repeated attempts over an extended period of time.</p> <p>You understand that this authorization will stay in-force until you provide written notice to Grimes to terminate any/all relationships.</p> <p>You agree that unless otherwise specifically prohibited by applicable securities laws, you hereby release and hold Grimes and each of its officers, directors, members, employees, and agents harmless with respect to any and all claims that might result from Grimes acting and/or relying upon this authorization.</p>	

Client A Name

Client A Signature

Date

Client B Name

Client B Signature

Date