

SIMPLY STATED[®]

Trusted Contacts

A Trusted Contact is a close friend or family member that can communicate with Patelco when you can't be reached or if we suspect you might have fallen victim to a scam. As part of Patelco's commitment to our members' financial wellbeing, Trusted Contacts adds another layer of security in protecting your assets and allows us to step in at critical moments.

Benefits of Having a Trusted Contact

A Trusted Contact can help you and protect your account by

- **Avoiding Scams** - Helping protect assets and respond to suspected financial exploitation.
- **Staying Connected** - Helping Patelco connect with you if we are unable to reach you and have concerns about your wellbeing.
- **Advocating for you** - Providing you with support and resources when you need it most.

How would having a Trusted Contact help?

Maybe we need to get in touch with a member but can't when:



A member is traveling



There is a natural disaster



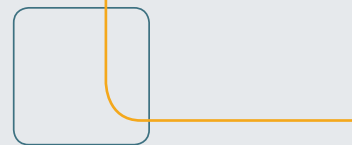
There is a concern about fraud



A member is having a health issue

Important things to Know

- **Who Should I Choose** - Trusted Contacts are usually family members or close friends 18 years or older – people you trust and who are likely to be in the best position to know your current situation.
- **What can they do** - A Trusted Contact can help Patelco respond quickly to signs of financial abuse, scams, health issues, and help us to contact you if we are unable to reach you.
- **What can't they do** - A Trusted Contact is unable to act on your behalf, conduct transactions, or engage in account activity (unless they're already an authorized party on your account such as a joint owner or Trustee).
- **Under what circumstances will Patelco contact me if I'm listed as a Trusted Contact on a members account?** - If an emergency, such as a health crisis or suspected incapacity of the member arises, Patelco may contact the Trusted Contact for guidance. If we need to connect with a member, but can't reach them, we may contact you for assistance in reaching them. We may also contact you if we have any suspicions of unauthorized activity on the account.



SIMPLY STATED[®]

Trusted Contacts

How do I add a Trusted Contact to my account?

Begin by gathering the following information about your Trusted Contact:

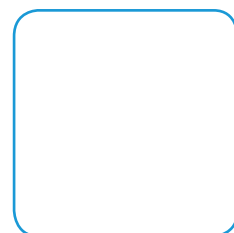
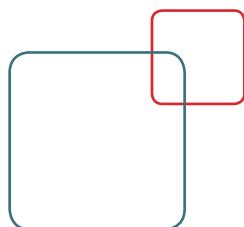
- Name
- Address
- Phone number
- Date of Birth
- Email
- Relationship to you

Once you have their contact information, adding a Trusted Contact to your Patelco account is quick and easy.

- Log in to Patelco Online
- Select Accounts > Joints, Beneficiaries, & Contacts
- Scroll to Trusted Contacts and add up to 2 contacts

Note: If you are using the mobile app, select More >Accounts > Joints, Beneficiaries, & Contacts.

If you prefer, you can also print and complete the Trusted Contact form at [Patelco.org/trustedcontacts](https://patelco.org/trustedcontacts) and return it to any Patelco branch or by mail. Please send completed forms to PO Box 2227 Merced, CA 95344.



Financial Wellbeing Support

Financial Wellbeing Resources

Whether you're looking to save money, create a budget, or reduce your debt, Patelco's Financial Wellness Center has many resources available to support your financial wellbeing.

Fraud Resources

Learn how to avoid the latest scams, keep your accounts safe, and get help from Patelco.

More information

If you have additional questions, we're here for you. Visit patelco.org/ContactUs to talk to us via secure message, by phone, or in an appointment on Zoom or at your nearest branch.



Scan to learn more