

Schwab.com

1-800-435-4000

(美國境內)
(inside the U.S.)

+1-415-667-8400

(美國境外)
(outside the U.S.)

1-888-686-6916

(多語服務)
(multilingual services)

我們隨時為您提供協助。

We're here to help.

- 請使用這個表格, 為您的嘉信帳戶增加最多兩個信任的聯絡人。您也可以前往 Schwab.com 或致電 1-800-435-4000, 更新信任的聯絡人資訊。
- Use this form to add up to two Trusted Contacts for your Schwab accounts. You may also update your Trusted Contact information by visiting Schwab.com or calling 1-800-435-4000.
- 增加一名信任的聯絡人, 讓嘉信可在必要時聯絡到您。信任的聯絡人是您允許嘉信聯絡並揭露您的帳戶資料的人士, 以處理可能發生的金融剝削、確認您的聯絡資料、健康狀態、或法律監護人、執行人、受託人或授權書持有者的身分, 或其他符合適用法令規定之情況。
- Adding a Trusted Contact provides Schwab with a resource to contact on your behalf, if necessary. A Trusted Contact is a person whom you are permitting Schwab to contact and disclose information to about your account to address possible financial exploitation; to confirm your contact information, health status, or the identity of any legal guardian, executor, trustee, or holder of a power of attorney; or as otherwise permitted by applicable rules.

指定信任的聯絡人 Trusted Contact Designation

- 您必須指定一位信任的聯絡人。
- Naming a Trusted Contact is optional.
- 信任的聯絡人必須年滿 18 歲。
- The Trusted Contact(s) must be at least 18 years old.
- 信任的聯絡人將無法檢視您的帳戶資料、執行交易或對帳戶活動提出問題。
- The Trusted Contact(s) will not be able to view your account information, execute transactions, or inquire about account activity.
- 嘉信建議您不要指定已經授權並可為您的帳戶進行交易的人士, 或會收到您嘉信帳戶相關資料的人士作為信任的聯絡人, 例如您的財務顧問、投資顧問或授權書持有人或僅有檢視權人士。
- Schwab suggests that your Trusted Contact(s) not be someone who is already authorized to transact business on your account(s) or already able to receive information about your Schwab account(s)—e.g., financial consultant, investment advisor, or by virtue of Power of Attorney or View Only authority.
- 您無需分別為每一個嘉信帳戶指定不同的信任的聯絡人。只要指定一次, 即涵蓋所有您身為帳戶持有人或共同帳戶持有人、受託人或代理人的帳戶。
- You do not need to designate a separate Trusted Contact for each Schwab account. A single designation covers all Schwab accounts over which you are the account holder or joint account holder, trustee, or agent.
- 若帳戶有多位帳戶持有人、受託人或代理人, 請為每一位帳戶持有人、受託人或代理人單獨填寫一份信任的聯絡人表格。
- For accounts with multiple account holders, trustees, or agents, please fill out a separate Trusted Contact form for each account holder, trustee, or agent.
- 僅有帳戶持有人可以為帳戶新增、更新或移除信任的聯絡人。
- Only you as the account holder have the ability to add, update, or remove a Trusted Contact(s) for your account(s).

1

帳戶持有人資料 Account Holder Information

信任的聯絡人只能適用於以下指定的帳戶持有人/受託人/代理人。嘉信會根據您填寫的信息來驗證您的身份, 為您提供服務, 與您溝通, 並向您提供有關我們產品和服務的信息。請進入 international.schwab.com/privacy 了解嘉信的私隱政策。

The Trusted Contact designation(s) only applies to the Account Holder/Trustee/Agent named below. Schwab will use the information you provide to verify your identity, provide services, communicate with you, and provide you with information about our products and services. Learn more at international.schwab.com/privacy.

如果您沒有社會安全號碼, 請提供一個您的嘉信帳戶號碼。

If you do not have a Social Security Number, please provide one of your Schwab Account Numbers.

社會安全號碼
Social Security Number

or

嘉信帳戶號碼
Schwab Account Number

姓名 頭銜, 名字
Name Title, First

中間名
Middle Name

姓氏, 後綴
Last, Suffix

2

信任的聯絡人 Trusted Contact Person(s)

本表格所提供的信任的聯絡人資料將取代所有目前存檔的信任的聯絡人資料。

Trusted Contact information provided on this form will replace all Trusted Contact information currently on file.

聯絡人 1 Person 1

姓名 頭銜, 名字
Name Title, First

中間名
Middle Name

姓氏, 後綴
Last, Suffix

關係 Relationship

請只選擇一個。
Please select only one.

配偶
Spouse

伴侶
Partner

子女
Child

父母
Parent

兄弟姊妹
Sibling

朋友
Friend

其他
Other



請為名單上每一位信任的聯絡人提供至少一種聯絡方式。

Please provide at least one method of contact for each Trusted Contact listed.

住址/合法地址 Home/Legal Street Address	不可填寫郵政信箱號碼 No P.O. Boxes	城市 City
國家 Country	州/省 State or Province	郵遞區號 Postal or Zip Code
住家電話號碼 Home Phone Number	手機號碼 Mobile Phone Number	電郵地址 Email Address

聯絡人 2 Person 2

姓名 頭銜, 名字 Name Title, First	中間名 Middle Name	姓氏, 後綴 Last, Suffix
關係 Relationship		
<input type="checkbox"/> 配偶 Spouse	<input type="checkbox"/> 伴侶 Partner	<input type="checkbox"/> 子女 Child
<input type="checkbox"/> 父母 Parent	<input type="checkbox"/> 兄弟姊妹 Sibling	<input type="checkbox"/> 朋友 Friend
<input type="checkbox"/> 其他 Other		

請只選擇一個。
Please select only one.

請為名單上每一位信任的聯絡人提供至少一種聯絡方式。

Please provide at least one method of contact for each Trusted Contact listed.

住址/合法地址 Home/Legal Street Address	不可填寫郵政信箱號碼 No P.O. Boxes	城市 City
國家 Country	州/省 State or Province	郵遞區號 Postal or Zip Code
住家電話號碼 Home Phone Number	手機號碼 Mobile Phone Number	電郵地址 Email Address

3

帳戶持有人/受託人/代理人授權協議和簽名 Account Holder/Trustee/Agent Authorization Agreement and Signature

我瞭解, 嘉信並無規定必須聯絡我信任的聯絡人。只要透過電話或寫信至我的帳戶報表上顯示的地址, 我可以隨時撤銷相關授權。在下方簽名, 即表示我與我的繼承人同意嘉信、嘉信的前任、後任、職員、主管、員工、代理人、服務代表、父母、附屬機構、受讓人與律師免於承受任何因索償、判決、稅金、罰款、罰金、損害、責任、費用或開支 (包含但不限於律師費與專家證人費) 而導致或與之相關的所有傷害, 因嘉信未聯絡本表格上所列之我的信任的聯絡人, 或與嘉信因聯絡我的信任的聯絡人而由嘉信招致之任何索償、判決或訴訟。

I understand that there is no requirement that Schwab reach out to my Trusted Contact Person and that I may withdraw this Authorization at any time by notifying Schwab via phone or in writing at the address shown on my account statement. By signing below, I and my heirs agree to indemnify and hold Schwab, its predecessors, successors, officers, directors, employees, agents, representatives, parents, affiliates, assigns, and attorneys harmless from and against any and all claims, judgments, taxes, fines, penalties, damages, liabilities, costs, and expenses (including but not limited to attorneys' fees and expert witness fees) incurred by Schwab as a result of any claim, judgment, or proceeding arising out of or relating to Schwab contacting, or failing to contact, my Trusted Contact Person(s) identified in this form.

在下方簽名, 即表示我授權嘉信及其附屬機構, 與上方列出信任的聯絡人分享嘉信所持有有關於我的非公開個人資料。非公開個人資料包含但不限於金融帳戶資料與結餘、購買證券或保險產品之建議, 依美國聯邦政府 1999 年金融服務現代化法第五章修訂後之規定, 或依其他聯邦或州法令之規定的可識別身份的個人財務資料, 包括 (i) 由消費者提供給金融機構; (ii) 因與消費者進行交易或為消費者執行服務所取得; 或 (iii) 由金融機構以其他方式取得的個人財務資料。

By my signature below, I authorize Schwab and its affiliates to share my nonpublic personal information held at Schwab with the named Trusted Contact Person(s) identified above. Nonpublic personal information includes, but is not limited to, financial account information and balances, recommendation for purchase of a security or insurance product, and, as defined in Title V of the federal Financial Services Modernization Act of 1999 as amended, or as defined by any other federal or state law, personally identifiable financial information (i) provided by a consumer to a financial institution; (ii) resulting from any transaction with the consumer or any service performed for the consumer; or (iii) otherwise obtained by the financial institution.

我瞭解, 為處理可能發生的金融剝削、確認我目前的聯絡資料或健康狀態或法律監護人、執行人、受託人或授權書持有者的身份, 或在符合美國金融監管局 (FINRA) 規定的情況下, 嘉信或我的顧問可能與信任的聯絡人聯絡, 並揭露我的帳戶資料。

I understand that Schwab or my advisor may contact the Trusted Contact Person(s) and disclose information about my account to address possible financial exploitation; to confirm the specifics of my current contact information or health status or the identity of any legal guardian, executor, trustee, or holder of a power of attorney; or as otherwise permitted by FINRA rules.

我瞭解, 若我的帳戶有連結的投資顧問, 我的信任的聯絡人資料將提供給該投資顧問。嘉信可能告知該投資顧問嘉信與信任的聯絡人之間的互動。我同意, 嘉信不為投資顧問對信任的聯絡人資料之使用負責, 且無法加以監控。

I understand that if an investment advisor is linked to my account(s), then my Trusted Contact Person(s) information will be made available to the investment advisor, and Schwab may notify the investment advisor of Schwab's interactions with the Trusted Contact Person(s). I agree that Schwab will not be responsible for, and cannot monitor, the investment advisor's use of the Trusted Contact Person(s) information.



請在此簽署
SIGN HERE



請以藍色或黑色筆
墨簽署並填上日期。
Please sign and date
using blue or black ink.

帳戶持有人簽名
Account Holder Signature

簽署日期 (月/日/年)
Today's Date (mm/dd/yyyy)

請以英文正楷填寫姓名 頭銜, 名字
Print Name Title, First

中間名
Middle Name

姓氏, 後綴
Last, Suffix

4

遞交方式 Return Instructions

- 上載網上安全訊息 (如果您已經是嘉信的客戶, 且有網上存取帳戶權限)。
Upload online with secure messaging (if you are an existing client and have online access to your account).
 1. 前往Schwab.com 並登入您的帳戶。
Go to Schwab.com and log in to your account.
 2. 點擊「信息中心」連結 (在「服務」下方), 接著點擊「輸入新訊息」連結。
Click the Message Center link (under Service), and then click the Compose New Message link.
 3. 點擊「添加新文件」(Add File) 並上傳本表格作附件。
Upload your form as an attachment by clicking the Add File button.
 4. 信息輸入完成後, 點擊「發送」(Send)。
When your message is complete, click Send.
- 傳真至 1-888-526-7252 (美國境內) 或 1-415-956-3212 (美國境外)。
Fax to 1-888-526-7252 (within the U.S.) or 1-415-956-3212 (outside the U.S.).
- 親自遞交至您鄰近的嘉信分行 (請至 Schwab.com/branch 查詢分行地址)。
Bring to your nearest Schwab branch (visit Schwab.com/branch for locations).
- 郵寄至以下其中一個地址:
Mail to any of the following addresses:

普通郵件 (西區)
嘉信理財
(Charles Schwab & Co., Inc.)
P.O. Box 982600
El Paso, TX 79998-2600

普通郵件 (東區)
嘉信理財
(Charles Schwab & Co., Inc.)
P.O. Box 628291
Orlando, FL 32862-8291

速遞郵件 (西區)
嘉信理財
(Charles Schwab & Co., Inc.)
1945 Northwestern Dr.
El Paso, TX 79912

速遞郵件 (東區)
嘉信理財
(Charles Schwab & Co., Inc.)
1958 Summit Park Dr., Ste. 200
Orlando, FL 32810

