A Trusted Brokerage Contact Does Not Get Trading Authority - working notes

One situation. Clear facts. An honest next step.

For U.S. brokerage accounts, naming a trusted contact lets the firm contact that person in limited circumstances. It does not by itself authorize trades, account decisions or a power of attorney.

Hypothetical example: An account holder explains that a trusted contact cannot trade solely because of the designation and asks the firm separately about any broader authority needed.

01 Read the role before supplying a name

Read the firm's actual trusted-contact explanation.

Verified firm route

Reason for this review

Role wording to understand

02 Keep the permitted contact within its limits

Distinguish limited contact from transaction authority.

Permitted contact circumstances

Authority the role does not grant

Separate advice question

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03 Explain the limited task to the proposed contact

Discuss willingness and current details privately.

Willingness discussed

Details checked privately

Misunderstanding to clarify

04 Confirm the record without testing unauthorized access

Submit through the firm's process and confirm status.

Submission status

Record confirmation

Future update trigger