

## Why you might appoint a Trusted Contact Person

A Trusted Contact Person is someone you choose who Aviva Life & Pensions Ireland DAC (we) may contact if we cannot reach you or if we have concerns that you might be at risk of financial abuse.

## Important information about your Trusted Contact Person

- They are not your legal representative.
- They cannot make financial decisions for you.
- They cannot access your policy information.
- They cannot make changes to your policy.
- They will not be given any confidential information about you or your policy unless we need to share it with them to help protect you.
- They act only as a point of contact if we cannot reach you or if we have concerns about possible financial abuse.

**Financial abuse** can include someone taking, or trying to gain access to, your money, property, or assets without your permission, or pressuring or intimidating you into giving them access.

## When we might contact your Trusted Contact Person

### We may contact them if:

- We are concerned about possible financial abuse, fraud or a scam affecting you.
- We need to confirm your current contact information.
- We need to understand or confirm your current health status.
- We need to check if you have a legal representative in place, for example, a power of attorney.
- We are having trouble communicating with you directly.

## Other Legal Arrangements

If you have a legal support arrangement in place, such as having a decision-making assistant or a legal representative, we will deal with that person instead. We will only contact your Trusted Contact Person if no such legal arrangement exists.

## You stay in control

Choosing a Trusted Contact Person is **entirely your decision**.

You can change or remove your Trusted Contact Person at any time by writing to Aviva Life & Pensions Ireland DAC at the address below, emailing our customer service centre [csc@aviva.com](mailto:csc@aviva.com), or calling us on 1800 159 159.



## Policy owner signature and consent

### By signing this form, I confirm that:

- I have read and understood the information included in the form, and I understand the role and limitations of my Trusted Contact Person.
- I understand that Aviva Life & Pensions Ireland DAC may (but are not required to) contact my Trusted Contact Person in the circumstances outlined above, and I consent to them doing so.
- I have discussed this arrangement with my nominated Trusted Contact Person, and they have agreed to act in this role.
- I understand I can cancel this arrangement at any time by writing to Aviva Life & Pensions Ireland DAC at the address below, emailing [csc@aviva.com](mailto:csc@aviva.com), or calling 1800 159 159. I will include my full name, policy number(s), and clearly state that I wish to remove my Trusted Contact Person nomination.

Policy owner signature

Print Name

Date                    /                    /

## Trusted Contact Person signature and consent

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### Part B – to be completed by Trusted Contact Person

#### I understand that the policy owner has nominated me to be their Trusted Contact Person, and by signing this form, I confirm that:

- I have read and understood the information in this form, including the Data Protection Notice, and I agree to act as Trusted Contact Person for the policy owner named above.
- I understand that this role does not make me a legal representative and that I cannot make decisions or policy changes on behalf of the policy owner named in Part A above and I cannot access any information about their policy or policies.
- I understand that Aviva Life & Pensions Ireland DAC may (but are not required to) contact me in the circumstances outlined above and that they can keep my name and contact details on file for the sole purpose of contacting me in relation to my role as Trusted Contact Person.
- I understand that I can cancel my consent to act as a Trusted Contact Person at any time by writing to Aviva Life & Pensions Ireland DAC at the address below, emailing [csc@aviva.com](mailto:csc@aviva.com), or calling 1800 159 159. I will include my full name and address, the policy owner's full name and address, and state that I no longer wish to act as the policy owner's Trusted Contact Person.

Trusted contact person signature

Print Name

Date                    /                    /



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## Data Protection Notice

### Please read this Data Protection Notice carefully before you complete the form.

Aviva Life & Pensions Ireland DAC (“Aviva”), the data controller, will use the personal information you provide in this form to record your nominated Trusted Contact Person (TCP) and to contact them if we cannot reach you or if we have concerns about possible financial abuse, fraud, or your wellbeing.

Because you are providing information about another person, please make sure you share this data protection notice with them when asking for their consent.

### What information we collect

We will collect your name, address, date of birth and policy number. We will also ask you to provide the name and contact details of your nominated TCP.

### Why we use this information

We will only use this information to record and manage your TCP nomination, and to contact the TCP where needed for the reasons outlined in this form. This includes helping protect you from financial abuse or scams, or confirming your contact information, legal representation, or health status.

### Legal bases

Aviva is required by regulation to allow you to appoint a TCP and to keep a record of this appointment.

By signing this form, you are providing your consent for Aviva to process and, where necessary, share the information needed to deliver the support described in this form.

If you are being appointed as a TCP, your signature confirms your consent to being contacted by Aviva for the purposes set out in this form.

### Your rights

You have a number of rights in relation to your personal information. These include the right to access your personal data, the right to correct inaccurate or incomplete information, and the right to request the erasure or restriction of our use of your personal information. You also have the right to request the transfer of your personal data to another organisation and to object to our processing of your information.

You may withdraw your consent to have a TCP nomination in place at any time. Similarly, a TCP may withdraw their consent to be contacted for this purpose. Withdrawal of consent does not affect the lawfulness of any processing carried out before consent was withdrawn. However, it may limit our ability to provide this support.

### Who we share information with

We may share relevant information with your TCP, your legal representative, regulators, or approved service providers. The TCP details may also be shared with these third parties. We will only share what is necessary and where needed or legally required.

### Retention of your information

A record of the nomination or any withdrawal of any consent may be retained to meet our regulatory requirements and in line with our retention requirements.

### Contact us

Data Protection Officer, Aviva Life & Pensions Ireland DAC, Building 12, Cherrywood Business Park, Loughlinstown, Co. Dublin, D18 W2P5. Email: [dpo@aviva.com](mailto:dpo@aviva.com). To view our full Data Privacy Policy please visit <https://www.aviva.ie/about-and-support/privacy/>.