



Virtus Mutual Funds
 PO Box 534470
 Pittsburgh PA 15253-4470

Add a Trusted Contact

For assistance, please contact us at 800-243-1574 or visit our website at Virtus.com.

Important Information

Use this form to add a Trusted Contact to your Virtus Funds account(s). To designate a Trusted Contact person, please complete and sign this form, have your signature notarized, and mail to the address listed at the top of this form. Adding a Trusted Contact provides us with a resource to contact on your behalf, if necessary. A Trusted Contact is someone you allow us, our agents, and/or your financial advisor to contact and disclose information to about your account in the event that we suspect 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.

- Naming a Trusted Contact is optional.
- The Trusted Contact must be at least 18 years old.
- The Trusted Contact will not be able to execute transactions or inquire about account activity.
- We suggest that your Trusted Contact not be already authorized to transact business on your account(s) or already able to receive information about your account(s)—e.g., financial consultant, financial advisor, or by virtue of Power of Attorney or View Only authority.
- For accounts with multiple account holders, trustees, or agents, please fill out a separate Trusted Contact form for each account holder, trustee or agent.
- Only you as the account holder has the ability to add, update, or remove a Trusted Contact for your account(s).

1. Account Holder Information

Account Holder Name	U.S. Social Security Number
Address	Email Address
City, State, ZIP Code	Fund and Account Number(s)
Mobile Telephone Number	Evening/Alternate Number

By checking the preceding box, I authorize Virtus Mutual Funds to replace any conflicting information and/or add any missing information to my account records, with regard to the address, email address and telephone numbers provided in this section.

2. Trusted Contact Person

The Trusted Contact information provided on this form will replace all Trusted Contact information currently on file. Please provide at least one method of contact for the Trusted Contact listed.

Trusted Contact Name	Relationship to Account Holder
Address	Email Address
City, State, ZIP Code	Mobile/Alternate Number

