

## 1. Forms



1. TPFG Investment Management Agreement (IMA)
  2. TPFG Risk Profile & Statement of Investment Selection (SIS)
  3. Fidelity Trust Account Application\*
  4. Fidelity Transfer of Assets Form *(if applicable – please Include a statement)*
- \*Please included copies of first and signatures pages of the trust document**

### Optional Forms:

5. Fidelity Standing Payment Instructions Form (Ongoing/Standing Instructions)

- If including a check, make payable to: **Fidelity Investments Inc. FBO Client Name.**
- Please call TPFG Client Services to obtain a pre-assigned account number.
- **Send checks directly to Fidelity Investments.**

### Please send checks to:

Fidelity investments  
PO Box 770002  
Cincinnati, OH 42577

### Overnight Mail:

Fidelity Investments  
100 Crosby Parkway  
Mailzone KC1J  
Covington, KY 41015  
(800) 523-1203

## 2. Submit



Send all forms to The Pacific Financial Group.

Electronically: [TeamCS@TPFG.com](mailto:TeamCS@TPFG.com)

OR, Fax: 425-451-7731

OR, Mail: The Pacific Financial Group, Inc.  
Attn: Client Services  
777 108<sup>th</sup> Avenue NE, Ste 2100,  
Bellevue, WA 98004  
Phone: 800-735-7199

1. Once TPFG receives the paperwork, TPFG's client services team will send you a confirmation email.
2. If you do not hear from TPFG within 2 weeks after receiving the new account confirmation email, please follow-up with TPFG to be sure everything is in good order.
3. Once the account has been traded, TPFG's client services team will send you a confirmation email.