

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 include 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

OR, Fax: 425-451-7731

OR, Mail: The Pacific Financial Group, Inc.
Attn: Client Services
777 108th 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.