Personal Choice Retirement Account (PCRA) for Nationwide Plans Paperwork and Process

1. Open Schwab PCRA Account

4. Schwab LPOA **for a Participant**
5. Nationwide Memorandum of Understanding (MOU) - *Some plans have a plan specific MOU - contact your Sales Representative to confirm. Ph: 866-583-8734*

*****Fax Nationwide MOU and Schwab LPOA for Participant to Nationwide to open the Schwab PCRA Account.*****

Phone: **877-677-3678**
Fax: **877-677-4329**

2. Forms

1. TPFG Investment Management Agreement (IMA)
2. TPFG Risk Profile & Statement of Investment Selection (SIS)
3. Schwab LPOA to Authorize an Investment Advisor – include 8-digit Schwab PCRA Account Number **(obtain account number by calling Schwab's PCRA desk: 888-393-7272. Takes 3-5 business days to establish Schwab PCRA Account after faxing forms to Nationwide.)**
4. Schwab LPOA for a Participant

3. Submit

Electronically: TeamCS@TPFG.com
OR, Fax: 425-451-7731

*** Once TPFG receives the paperwork, TPFG's client services team will send you a confirmation email.***

4. Follow-up

Once the account number is provided to TPFG and if the account is in good order, TPFG's client services team will reach out to you by email in 5 - 7 days to let you know that TPFG is authorized on the Schwab PCRA account and we are now just waiting for funding.

If you do not hear from TPFG within 2 weeks, please follow-up with TPFG to be sure everything is in good order.

5. Funding

In follow-up meeting/call with client:
Call Nationwide and transfer/exchange "the maximum" or the desired amount to their Schwab PCRA Account. If the plan allows, request future contributions to go directly to the Schwab PCRA. Notify TPFG's client services team that the PCRA Account has been funded. Some plans may allow for Schwab PCRA account to be funded online via client's retirement website.

*** Once the account has been traded, TPFG's client services team will send you a confirmation email. ***

THE PACIFIC FINANCIAL GROUP