

## 1. Forms



1. TPFG Investment Management Agreement (IMA)
2. TPFG Risk Profile & Statement of Investment Selection (SIS)
3. Schwab One Application for Personal Accounts
4. Schwab Transfer Form *(if applicable – please Include a statement)*

### **Optional Forms:**

5. Schwab MoneyLink Electronic Funds Transfer Form

- If including a check, make payable to: **Charles Schwab FBO Client Name.**
- **Send checks directly to Charles Schwab.**

### **Please send checks to:**

Charles Schwab  
PO Box 982603  
El Paso TX 79998

### **Overnight Mail:**

Charles Schwab  
1945 Northwestern Drive  
El Paso, TX 79912-1108  
(800) 854-5531

## 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  
11624 SE 5th Street, Ste 100,  
Bellevue, WA 98005  
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.