Fidelity - Strategy PLUS / Trust Account Paperwork and Process

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**

5. Fidelity Establishing Standing Banking Instructions Intake Form - Highly recommended to fund account, rather than sending a check.

- **Make checks payable to: Fidelity Investments Inc. FBO Client Name.**
- **Please call TPFG Client Services (800-735-7199) to obtain a pre-assigned account number. Include this acct no. in the memo section of the check.**
- **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
11624 SE 5th Street, Suite 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.

THE PACIFIC FINANCIAL GROUP