# Managed Strategists / Qualified Paperwork and Process

## 1. Forms

1. TPFG Investment Management Agreement (IMA)
2. TPFG Risk Profile & Statement of Investment Selection (SIS)
3. Fidelity Premier Select IRA Application
4. Fidelity Transfer of Assets Form *(if applicable – please Include a statement)*

**Optional Forms:**

5. Fidelity Standing Payment Instructions Form (Ongoing/Standing Instructions)
6. Fidelity IRA One-Time Distribution Form

- **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.*