

## 1. Forms



1. TPFG Investment Management Agreement (IMA)
2. TPFG Risk Profile & Statement of Investment Selection (SIS)
3. TDA IRA/Roth Application
4. TDA Transfer Form (*if applicable – please Include a statement*)
5. TDA Move Money Form – Highly recommended to fund account, rather than sending a check.

### **Optional Form:**

6. TDA IRA Distribution Form

- **If including a check, make payable to: **TD Ameritrade, 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 TD Ameritrade.**

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

TDA Institutional Inc  
PO BOX 650567  
Dallas, TX 75265-0567

### **Overnight Mail:**

TD Ameritrade Institutional  
7801 Mesquite Bend Drive, Suite 112  
Irving, TX 75063-6043  
(800) 400-6288

## 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 5<sup>th</sup> 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.*