

1. Forms



1. TPFG Investment Management Agreement (IMA)
2. TPFG Risk Profile & Statement of Investment Selection (SIS)
3. TDA Brokerage 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.

- 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

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.