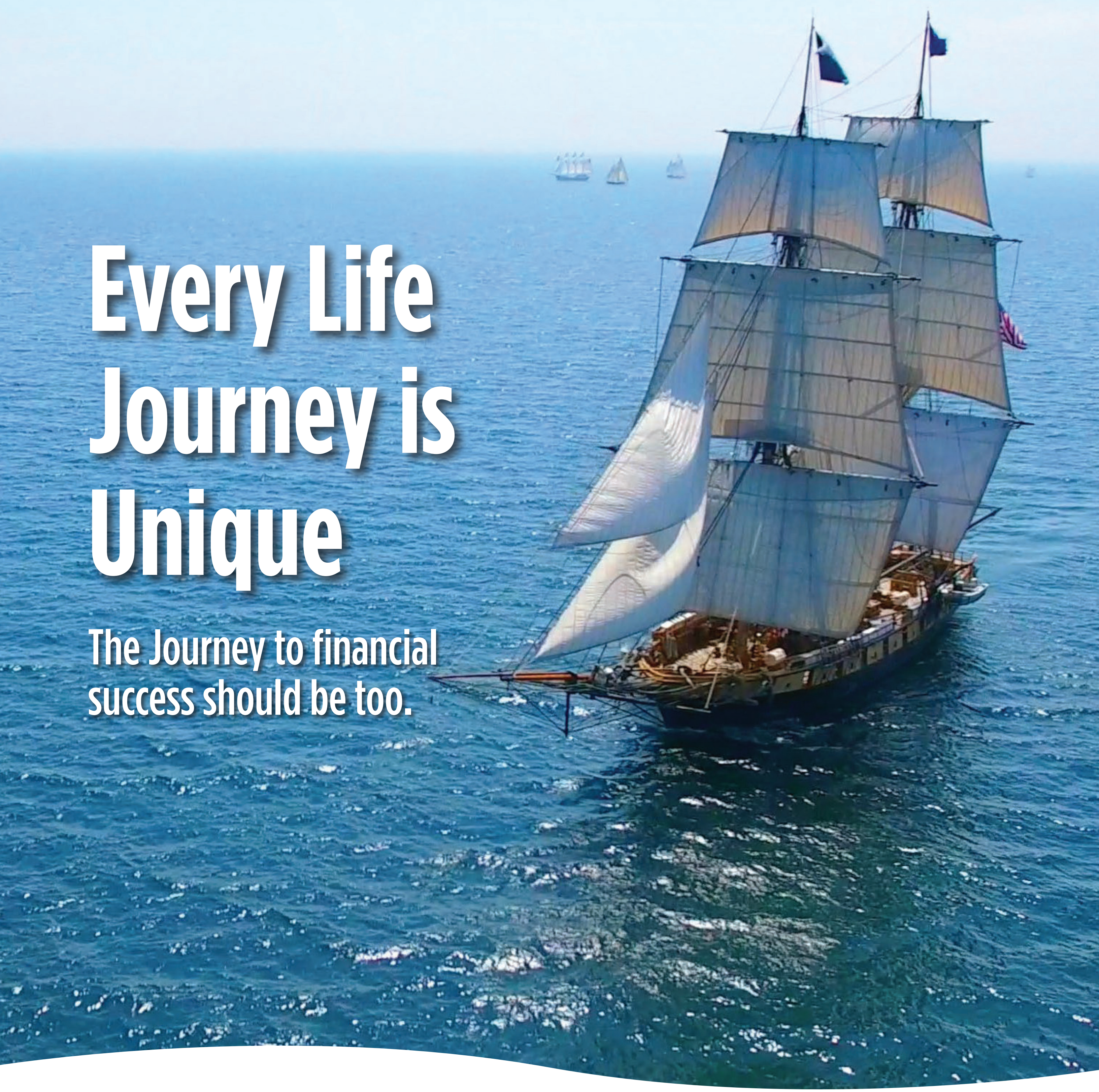
Every Life Journey is Unique

The Journey to financial success should be too.



THE PACIFIC FINANCIAL GROUP

Corporate Profile

Anchored in Innovation.

Since 1984, The Pacific Financial Group, Inc. (TPFG) has built a rich tradition of serving financial advisors and investors with best-in-class investment solutions and concierge-level customer service. The firm is a pioneer in the evolution of Self-Directed Brokerage Account Management (SDBA) for 401(k), 403(b), and 457 plan windows.

At our core, we are an innovator. An innovator of products and services that empower independent financial advisors to give advice where it's needed most. During our history, we've transformed from a small, boutique investment management firm to the only multi-manager, mutli-mandate marketplace leader in the SDBA space.

The firm has now expanded unique offerings and pricing within our turnkey asset management platform to service advisors on all aspects of their business.

Consider TPFG a trusted partner with a shared vision for your success. We're riding alongside on your journey to accelerate growth and deliver the best possible investment outcomes for your clients.

Megan Meade
Founding | Managing Member

Megan

40+ Years
Over four decades in business

4.8 Billion
Assets under management
As of 7/15/25

21,000
Number of investors we serve

We Give You Something Different.

Our Turnkey Asset Management Platforms (TAMP) provide advisors with two different levels of consulting services, a wide range of investment solutions for all types of accounts, including self-directed brokerage accounts (SDBA), and advanced technology to enhance the advisor-client experience.

Our tech stack includes RiskPro® and a Guided Paperwork Solution (GPS) for easy digital client onboarding and servicing.

Envision TPFG as your reliable ally, dedicated to expanding your practice, optimizing your time, and helping your clients reap the benefits of success.

Holistic Management Made Easy

Our solutions are built to accommodate all account types, including in-plan SDBA, our platforms are tailored to support both multi-manager and multi-strategy approaches seamlessly.

Institutional Level Money Management.

Advantage TPFG.

The Pacific Financial Group (TPFG) brings the expertise of an elite lineup of asset managers to the average investor.

Institutional money management is not just for the ultra-wealthy or large institutional investors anymore. Retirement plan investors have worked hard and earned the right to enjoy the same sophisticated and transparent asset management services that large investors have benefited from for decades.

The Pacific Financial Group has attracted the attention of some of the world's premiere money managers, which gives investors unique access to institutional level asset management. These institutional money managers provide access to an array of TPFG strategies that include many different investment styles with timely research and differing capital market assumptions.

TPFG is committed to leveraging the discipline of institutional asset managers to bring advisors a level of innovation, customization and experience for their clients.

CAPITAL GROUP® | AMERICAN FUNDS®

J.P.Morgan Asset Management

Fidelity INVESTMENTS

Janus Henderson INVESTORS

PIMCO

BlackRock.

Invesco

BNY

MEEDER

MFS®

Invest Beyond Boundaries.

Diversify Using Elite Managers Curated into Models.

Strategy PLUS **offers a suite of model portfolios available inside workplace retirement accounts, with focused or blended allocation styles, fueled by a variety of management choices. Personalized for different appetites.**

MULTI

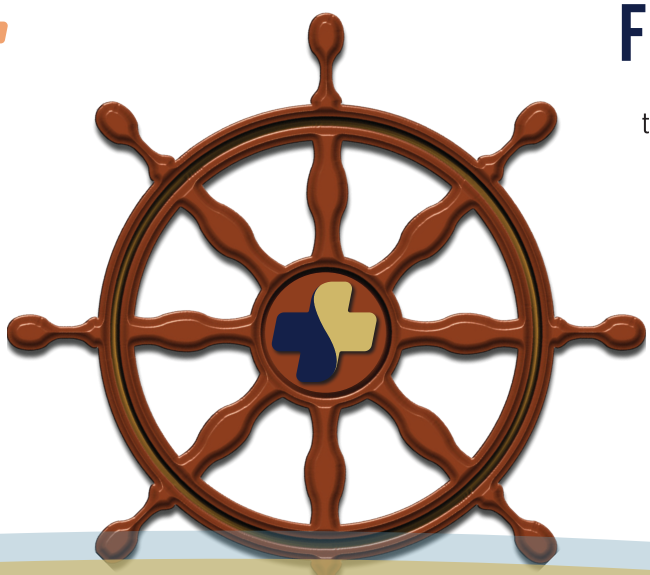
The most diversified set within the Strategy Plus lineup, constructed for the most comprehensive market exposure.

INDEX

Lower underlying fees using passive holdings with tactical strategies.

FOCUS

Multiple strategic and tactical managers with unique synergies.



TARGET

Elevates traditional target date investing using active management.

SELECT

Very concentrated exposure to specific strategists.

Manager Research and Oversight.

Time-Tested and Trusted.

Providing continuous monitoring and due diligence of external Strategists

While outside evaluation is rare in the wealth management industry, we've engaged Wilshire, one of the most respected names in manager research. For more than 40 years, Wilshire has provided robust financial analytics and end-to-end investment services for institutional investors, financial advisors, intermediaries and pension plans.

Wilshire provides written due diligence evaluations and Manager Research Ratings on the strategies utilized in our 17 PFG Single Ticker Models. The firm also conducts formal investment due diligence meetings with our third-party investment managers, determining if investment guidelines are consistent with the style and strategy of each PFG Fund and appropriate for qualified retirement plans.

Think of Wilshire as an extra set of eyes on our PFG Single Ticker Models, which are the building blocks for our Strategy PLUS model suite.

Wilshire

With scrutiny intensifying standards evolving, oversight and due diligence have become more central to investment management companies.

Get in Touch.

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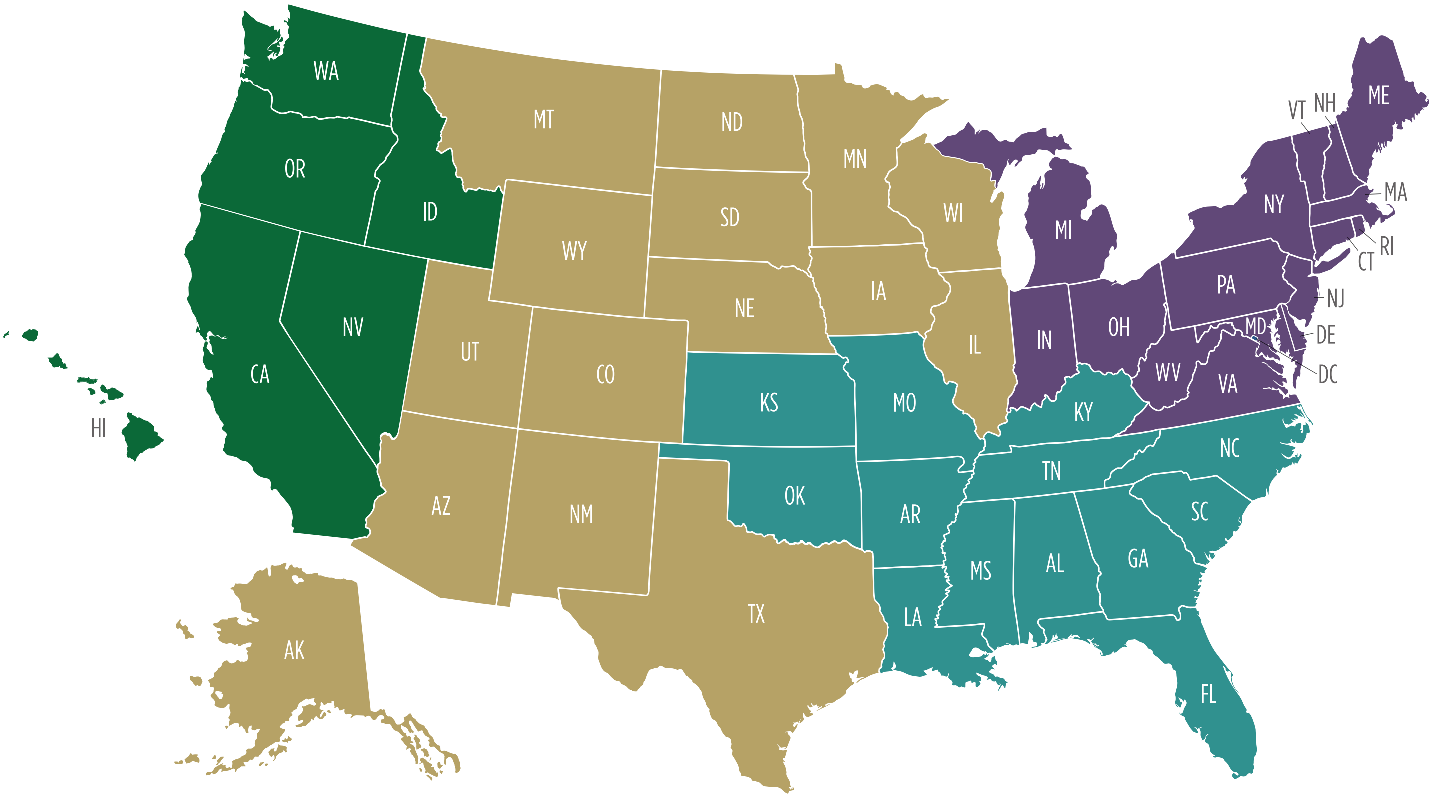

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THE PACIFIC FINANCIAL GROUP

Important Disclosures:

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