

FREQUENTLY ASKED QUESTIONS

1. How do I request money from my account?

- Please contact our office. Keep in mind, we cannot accept requests for funds via voicemail or email.
- Depending on the type of account, the request can take approximately 3 to 10 business days before you receive your money.

2. How do I contribute to my account?

- It is best to contact our office and we will help you make your contribution.
- If you are making a contribution with a personal or business check, please make sure there is a pre-printed name and address on the check.
- We can accept checks, bank money orders and cashier's checks. Note that we cannot accept cash.
- Checks are generally made payable to LPL Financial, but call our office to confirm. **Checks made to Financial Freedom Wealth Management Group cannot be processed.**

3. Who should I call if I have problems with Account View Online or if I want to set it up?

- Please call, text, or email us at the contact information below.

4. Can anyone on the team answer my questions?

- Yes! Anyone on our team can help you with general questions. At Financial Freedom, we operate as a team so you'll receive the same quality no matter who assists you. Also, any of our Financial Advisors can answer specific investment questions.

5. How do I get my tax statements?

- You can print your statements from Account View. Click "Client Login" on our website.
- You will generally receive your tax statements by mail from LPL Financial.

6. Who should I contact if my information has changed?

- Call, text, or email us using the contact information below and someone from our team will call you to confirm the changes.

7. What if I am having issues with E-signature?

- Please contact our office and a team member will assist you. We do have other options available for you to sign your documents.

8. Who should I contact if there is a major life event such as a death, marriage, birth, adoption, retirement, divorce, etc.?

- Contact our office and have the documents readily available to share in order to make this change.

9. Can I sign up for paperless statements?

- Yes! This can easily be done from your Account View or contact our office and a team member will assist you.

Connect with us

Email

info@financialfreedomwmg.com

Website

FinancialFreedomWMG.com

Phone & Text

(458) 777-4458

Fax

(888) 884-3511

Inspired Wealth

liveinspiredwealth.com

Instagram

[instagram.com/financialfreedomwmg/](https://www.instagram.com/financialfreedomwmg/)

LinkedIn

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