

Shareholder Name: _____

Account Number: _____

Social Security Number: _____

Phone Number: _____

Please check the box that corresponds to your desired New Model Portfolio.
Tactical Portfolios

- Conservative
- Moderate Conservative
- Balanced
- Moderate Growth
- Growth
- Aggressive Growth

OR
Strategic Portfolios (equity– fixed income ratio)

- 95 - 5
- 90 - 10
- 80 - 20
- 70 - 30
- 60 - 40
- 40 - 60
- 30 - 70

By signing below, I acknowledge that I understand the investment strategies and risk profile of the new model portfolio I am choosing, or I have discussed my options with the financial representative for my account.

This signed form may be faxed, scanned/emailed or mailed back to Meeder.

- For FAX delivery: (614) 766-6669
- For scanned/email delivery: clientservices@meederinvestment.com
- For mail delivery: Meeder Investment Management, 6125 Memorial Drive, Dublin, OH 43017 - Attention: Client Services

Shareholder Signature (Required)

Date (Required)

Name (Please Print)

Email Address

Joint Shareholder Signature (Required)

Date (Required)

Joint Name (Please Print)

Email Address

FOR QUESTIONS PLEASE CALL CLIENT SERVICES AT (866) 633-3371