

6125 Memorial Drive, P.O. Box 7177, Dublin OH 43017  $\bullet$  Toll Free 800-325-3539  $\bullet$  614-760-2159 Fax 614-766-6669  $\bullet$  www.meederfunds.com  $\bullet$  funds@meederinvestment.com

## **INSTRUCTIONS**

## **Step 1: Complete Application**

#### For IRA and IRA Rollover Accounts:

Complete the Meeder Funds IRA New Account Application. Keep one copy for your records.

#### For IRA SEP Accounts:

Complete IRS Form 5305-SEP to establish the plan, and a Meeder Funds IRA New Account Application for each participant.

#### **Step 2: Complete Transfer Form**

Please complete Sections 1 through 5 of this Transfer Request Form.

NOTE: All written instructions given to the resigning custodian may require your signature guaranteed by one of the following: a commercial bank; trust company; or a member of a national securities exchange. Check with your resigning custodian for their requirements.

Retain one copy of this form for your records.

### **Step 3: Mail Application and Transfer Form**

Mail completed forms to:

Meeder Funds c/o Mutual Funds Service Company, P.O. Box 7177, Dublin, OH 43017.

# **Step 4: Receipt of Purchase Confirmation**

The Transfer Agent for the Meeder Funds will arrange for the transfer of your current plan's assets.

Once your account has been established, a confirmation statement will be sent.

If you have any questions, please call the Meeder Funds Shareholder Services Toll Free 1-800-325-3539.

Meeder Funds IRA Transfer Request Form No: MF - IRATRANSREQ (9/2016)

1. SHAREHOLDER INFORMATION			4. INVESTMENT SELECTION		
			Fund	Investment	
Name	Social Secur	rity Number	☐ Prime Money Market Fund¹	\$	
Address			☐ Institutional Prime Money Market Fu	nd <sup>1</sup> \$	
City	State	Zip	☐ Total Return Bond Fund	\$	
Home Phone Work Phone		☐ Balanced Fund	\$		
2. CURRENT IRA	ACCOUNT INFORMA	ATION	☐ Muirfield Fund	\$	
Type of account to	o be transferred:		D Muli liela Falia	Ψ	
☐ Traditional IRA	☐ Roth IRA	☐ Qualified Plan or TSA	☐ Spectrum Fund	\$	
☐ Spousal IRA	☐ Education IRA	☐ SEP-Simplified	C Divided Occasion to Fund	•	
☐ Rollover IRA	☐ SIMPLE IRA	☐ Employee Pension	☐ Dividend Opportunities Fund	\$	
COMMINGLING AUTHORIZATION - I understand that commingling contributions from a qualified plan or TSA with regular IRA contributions will prohibit me from rolling these funds into another qualified plan or TSA in the future.  With this knowledge:			☐ Infrastructure Fund²	\$	
			☐ Dynamic Growth Fund	\$	
☐ I authorize the commingling of my regular IRA and rollover IRA funds.			☐ Aggressive Growth Fund	\$	
☐ I do not authorize the commingling of my regular IRA and rollover IRA funds.			☐ Quantex Fund	\$	
Transfer from: (Ple	ease complete entirely	)	□ Quantex Fund	Ψ	
			☐ Global Opportunities Fund³	\$	
Name of Resigning Trustee			5. AUTHORIZATION OF TRANSFER		
Account Number			To Resigning Trustee or Custodian:  Please liquidate	or (I/ ) of the account listed in Coat	
Address			2, and transfer the proceeds of the liquidation	or%) of the account listed in Sect n to my Meeder Funds IRA immediately.	
Addicas					
City	State	Zip	Your Signature	Date	
Phone Number			An important note: Your resigning trustee or custodian may require your signature to be guaranteed Call them for requirements.		
3. MEEDER FUNDS IRA ACCOUNT			Signature Guarantee Box		
	3 New Meeder Funds Acc				
_	(Enclose a Meeder Fund	,			
L	D Existing Meeder Funds Account #				
	N	Mutual Funds Service Company wil	I complete this Letter of Accept	ance.	
	lelivery to the Meeder Fur rvice Co. will accept the t		transfer, on a fiduciary to fiduciary basis,	all or part of the designated account as instruct	
	* *	unds [List Name of the Fund]			
	nclosed return envelope of following information on the following information of the following informat	or mail to: Meeder Funds, c/o Mutual Funds Se the check:	ervice Company, P.O. Box 7177, Dublin, OH	43017	
Account No.		Authorized Signature	Nata		

Meeder, Meeder Funds, and Muirfield Fund are registered trademarks of Meeder Investment Management, Inc. ¹Prior to October 7, 2016, the fund was known as the Meeder Money Market Fund. ²Prior to December 31, 2015, the Fund was known as the Meeder Utilities and Infrastructure Fund. Between December 31, 2015 and September 15, 2016, the fund was known as the Meeder Miller/Howard Infrastructure Fund. ³Prior to December 31, 2015, the Fund was known as the Meeder Strategic Growth Fund.

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