MEEDER

6125 Memorial Drive, P.O. Box 7177, Dublin OH 43017 • **Toll Free 800-325-3539** • 614-760-2159
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Meeder Investment Portfolios
IRA Transfer Request

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.

Please Note:

Your Meeder Investment Portfolio will be rebalanced quarterly to ensure proper allocation of funds.

The Meeder Investment Portfolios are designed and maintained by Meeder Advisory Services, Inc. (MAS). MAS is an affiliate of Meeder Asset Management, Inc., the investment adviser to the Meeder Funds®. Each of the Portfolios are comprised of one or more Meeder Funds® and are designed to meet different investment objectives and risk tolerance levels. On a periodic basis, MAS will make changes to the recommended allocation of Meeder Funds® in some or all of the Portfolios. When this occurs, Mutual Fund Services Co., the transfer agent for the Meeder Funds®, will buy or redeem shares of Funds in your account that comprise the affected Portfolio(s) to the extent necessary to match the Portfolio allocations recommended by MAS. For example, if MAS recommends that the Moderate Growth Portfolio reduce its holding of the Aggressive Growth Fund by 5% and you have indicated that your account should be invested consistent with that Portfolio, the appropriate number of shares of the Aggressive Growth Fund will be redeemed from your account so that the percentage allocation of Meeder Funds® shares held in your account mirrors that of the Moderate Growth Portfolio. By signing this transfer request, you authorize Mutual Fund Services Co. to buy or sell shares held in your account on a periodic basis in order to replicate the Meeder Investment Portfolio that you have selected.

1. SHAREHOLDER INFORMATION

Name | Social Security Number

Address

City | State | Zip

Home Phone | Work Phone

2. CURRENT IRA ACCOUNT INFORMATION

Type of account to be transferred:

- ☐ Traditional IRA
- ☐ Roth IRA
- ☐ Qualified Plan or TSA
- ☐ Spousal IRA
- ☐ Education IRA
- ☐ SEP-Simplified
- ☐ Rollover IRA
- ☐ SIMPLE IRA
- ☐ Employee Pension

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:

- ☐ I authorize the commingling of my regular IRA and rollover IRA funds.
- ☐ I do not authorize the commingling of my regular IRA and rollover IRA funds.

Transfer from: (Please complete entirely)

Name of Resigning Trustee

Account Number

Address

City | State | Zip

Phone Number

3. MEEDER INVESTMENT PORTFOLIOS IRA ACCOUNT

Transfer to:

- ☐ New Meeder Investment Portfolios Account (Enclose a Meeder Investment Portfolios IRA Application)
- ☐ Existing Meeder Investment Portfolios Account Account # _______________

4. INVESTMENT SELECTION- CHOOSE ONLY ONE PORTFOLIO

Portfolio	Investment
☐ Conservative	$ _____________
☐ Moderate Conservative	$ _____________
☐ Balanced Income	$ _____________
☐ Balanced	$ _____________
☐ Balanced Growth	$ _____________
☐ Moderate Growth	$ _____________
☐ Growth	$ _____________
☐ Aggressive Growth	$ _____________
☐ 30-70	$ _____________
☐ 40-60	$ _____________
☐ 60-40	$ _____________
☐ 70-30	$ _____________
☐ 80-20	$ _____________
☐ 90-10	$ _____________
☐ 95-5	$ _____________

5. AUTHORIZATION OF TRANSFER

To Resigning Trustee or Custodian:

Please liquidate ☐ all ☐ part ($ ___________ or _______%) of the account listed in Section 2, and transfer the proceeds of the liquidation to my Meeder Investment Portfolio IRA immediately.

Your Signature | Date

An important note: Your resigning trustee or custodian may require your signature to be guaranteed. Call them for requirements.

Signature guarantee by:

Name of Bank Firm

Signature of Officer and Title

Mutual Funds Service Company will complete this Letter of Acceptance.

Instructions for delivery to the Meeder Funds®.

Mutual Funds Service Co. will accept the transfer described above. Please liquidate and transfer, on a fiduciary to fiduciary basis, all or part of the designated account as instructed in Section 4.

Please make check payable to: Meeder Funds® [List Name of the Portfolio]

Please use the enclosed return envelope or mail to: Meeder Funds®, c/o Mutual Funds Service Company, P.O. Box 7177, Dublin, OH 43017

Also include the following information on the check:

Account No. | Authorized Signature | Date

FBO