



# Meeder Investment Portfolios Transfer Request

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## INSTRUCTIONS

<b>Step 1: Complete Application</b>
Complete the Meeder Funds® New Account Application. Keep one copy for your records.
<b>Step 2: Complete Transfer Form</b>
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.
<b>Step 3: Mail Application and Transfer Form</b>
Mail completed forms to:  The Meeder Funds® c/o Mutual Funds Service Company, P.O. Box 7177, Dublin, OH 43017.
<b>Step 4: Receipt of Purchase Confirmation</b>
The Transfer Agent for the Meeder Funds® will arrange for the transfer of your 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. Be advised that transactions resulting from rebalancing a portfolio will be considered the sale or purchase of a mutual fund and may have tax consequences. Please see your tax adviser for more details.**

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 ACCOUNT INFORMATION**

Type of account to be transferred:

- Individual  Joint  UGMA
- Individual Trust  Corporation

With this knowledge:

- I authorize the transfer from the current fund company or trustee to the Meeder Funds®

Transfer from: (Please complete entirely)

\_\_\_\_\_  
Name of Resigning Trustee

\_\_\_\_\_  
Account Number

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Phone Number

**3. MEEDER INVESTMENT PORTFOLIOS ACCOUNT**

- Transfer to:  New Meeder Investment Portfolios Account  
(Enclose a Meeder Investment Portfolios Application)
- Existing Meeder Investment Portfolios Account  
Account # \_\_\_\_\_

**4. INVESTMENT SELECTION- CHOOSE ONLY ONE PORTFOLIO**

Portfolio	Investment
<input type="checkbox"/> Conservative	\$ _____
<input type="checkbox"/> Moderate Conservative	\$ _____
<input type="checkbox"/> Balanced Income	\$ _____
<input type="checkbox"/> Balanced	\$ _____
<input type="checkbox"/> Balanced Growth	\$ _____
<input type="checkbox"/> Moderate Growth	\$ _____
<input type="checkbox"/> Growth	\$ _____
<input type="checkbox"/> Aggressive Growth	\$ _____
<input type="checkbox"/> 30-70	\$ _____
<input type="checkbox"/> 40-60	\$ _____
<input type="checkbox"/> 60-40	\$ _____
<input type="checkbox"/> 70-30	\$ _____
<input type="checkbox"/> 80-20	\$ _____
<input type="checkbox"/> 90-10	\$ _____
<input type="checkbox"/> 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 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 Transferring 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 Fund]

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