DRIVE Confidently:

Capturing opportunity during times of transition

MEEDER

CLIENT CONVERSATION GUIDE

Client Transition Strategy

01 TARGET

- Segment clients using the 80/20 rule.
- Communicate with the top 20% account AUM first, the next 20%, etc. until you contact each client.

02 SYNC

- Craft a consistent communication strategy to deliver the same information to every client.
- Convey details about each firm involved in the asset transition.

03 REACH

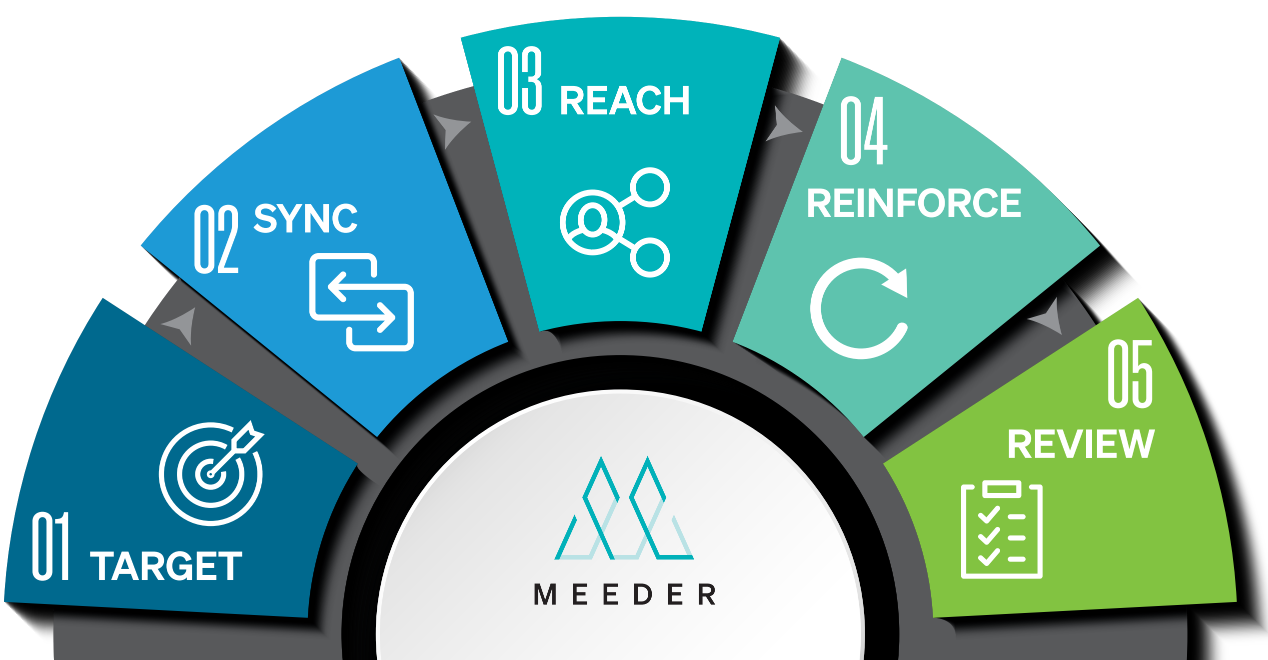
- Proactively use digital tactics including emails and phone calls to alert clients of upcoming changes. You want to ensure their transition is seamless and without surprises.

04 REINFORCE

- Get deeply familiar with the asset transition process and be the client's subject matter expert on-call.
- Reinforce the benefits and explain the timelines for execution.

05 REVIEW

- Follow up at each stage of the process.
- Call when the DocuSign is completed.
- Call with updates on the platform and tech access, upon asset transfer, and when account info is displayed on the new platform.
- Schedule reviews in advance.



Meeder Investment Management is the investment management firm that helps you drive confidently as we continue to manage client assets transitioning to the Primerica Advisors Lifetime Investment Program™. Meeder has been investing client, advisor, and institutional investment assets since 1974.

Meeder focuses on a comprehensive approach to investment management with a range of investment disciplines, and investment strategies to support advisors and their clients through the life cycle of the investment relationship including accumulation, preservation and distribution of wealth phases.

» $45B of assets under administration, as of 12/31/2022

» Tactical multi-disciplined and multi-factor model approach evaluating over 100 plus factors each day

» Risk-based investment strategy portfolios for clients based on their specific risk tolerance and investment objectives

» Tax Management Strategies that provide personalized portfolios that invest for risk, tax and specific client objectives.

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