DRIVE Confidently: Capturing opportunity during times of transition

MEEDER

AGENDA

MEEDER

CHANGE BRINGS OPPORTUNITY

CLIENT CONVERSATIONS

TRANSITION PARTNERS

Q&A SESSION

MANAGING THROUGH CHANGE

OPPORTUNITY TO DEEPEN CLIENT LOYALTY ACCELERATE AUM

CLIENT CONVERSATION GUIDE

DRIVE Confidently: Capturing Opportunity Amid Transition

Clients appreciate consistent communications during times of transition. Your personal outreach is sure to be viewed as a value-add to the development and retention of your relationship.

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

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

3 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.

4 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.

5 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.

Client Conversations During Change

5 Steps to Optimizing Account Transition Opportunity

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1	2	3	4	5
TARGET	**SYNC**	**REACH**	**RE-INFORCE**	**REVIEW**

1. TARGET

- Advisors should segment clients in order of importance based on investment assets and account size.
- A good rule of thumb is to follow the 80/20 Rule.
- Eighty percent of the investment assets are with 20 percent of the clients.
- Communication with the top 20 percent first is paramount.
- Then, communicate the transition strategy with the next 20 percent of the clients until all are contacted.

2. SYNC

- Communication is key during times of transition and will be seen as a “value add” to the development of the relationship. Schedule time for reviews in advance where possible.

3. REACH

- Each communication should be uniform and provide the same core information for each client.
- Advisors should include information about each company involved in the transition.

4. REINFORCE

Use email or phone calls to alert them of upcoming changes, to avoid any surprises.

5. REVIEW

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Provide consistent follow-up during each stage of the process.

Examples are:

- When DocuSign information has been completed
- When updates on the new platform occur
- When client accounts become accessible
- When assets have been transferred
- When new information is available on their investment strategy

Asset Transfer Partners

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ADVISORY SERVICES

BROKERAGE SERVICES

ASSET MANAGEMENT

Meeder Firm Overview

MEEDER

NEARLY
50 YEARS
OF EXPERIENCE

OVER
$45 BILLION
IN ASSETS UNDER ADVISEMENT
(As of 12/31/2022)

OVER
125 PROFESSIONALS

Why is Tactical important in a diversified portfolio?

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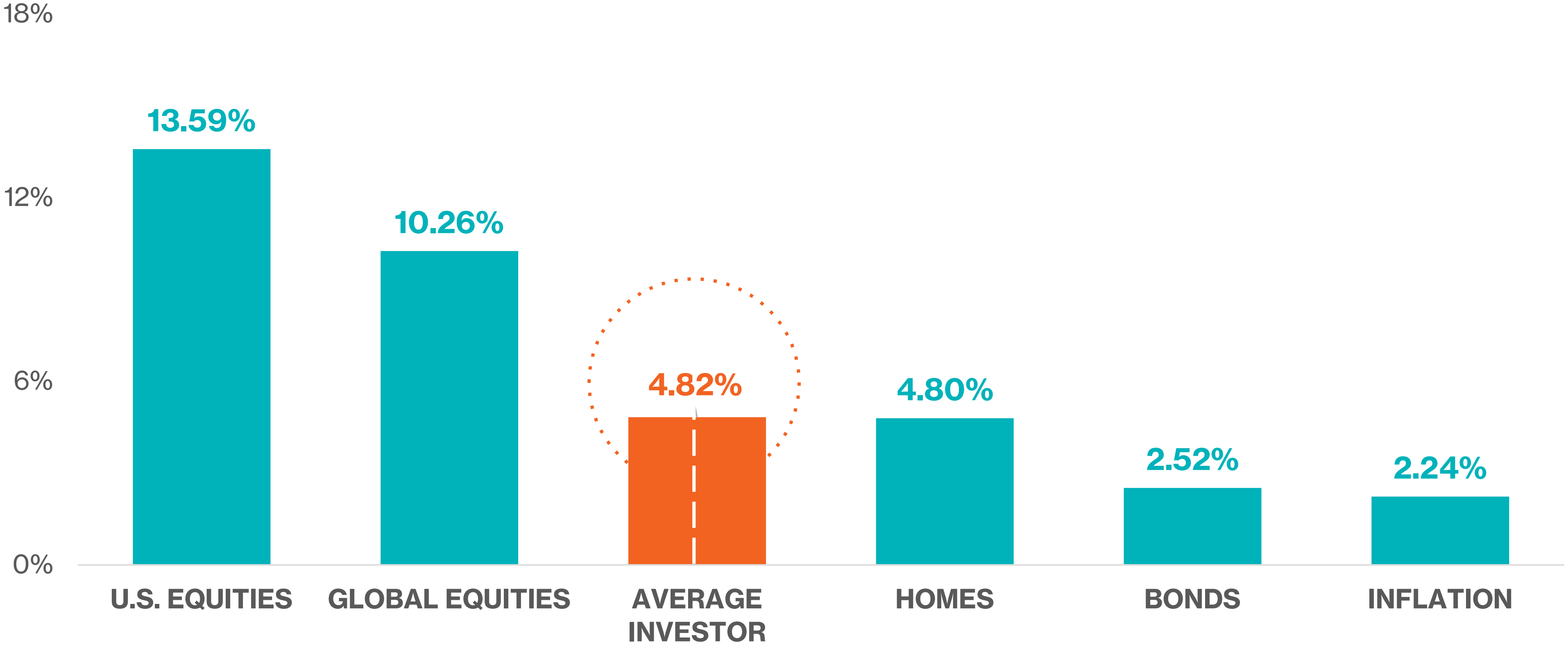
Average Investor – Past 13 Years, 2009 – 2022 Annualized Returns



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Meeder Tactical Portfolios

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BOTTOM UP
Valuations
Fundamentals
Sentiment

TOP DOWN
Economic
Monetary
Fiscal Policy

TECHNICALS
Trends
Momentum
Breadth

MULTI-DISCIPLINE / MULTI-FACTOR APPROACH

Meeder's unique tactical approach is focused to help you and your clients get to their investment destinations.

PRIMERICA ADVISORS LIFETIME INVESTMENT PROGRAM

Access Meeder's tactical approach for your goals.

Dynamic Growth Portfolio
100% Growth Strategy

Growth Portfolio
100% Defensive Equity Strategy

Moderate Growth Portfolio
70% Defensive Equity Strategy
30% Fixed Income Strategy

Conservative Growth Portfolio
50% Defensive Equity Strategy
50% Fixed Income Strategy

Conservative Portfolio
30% Defensive Equity Strategy
70% Fixed Income Strategy

Drive with Meeder

Target Net Equity Exposure

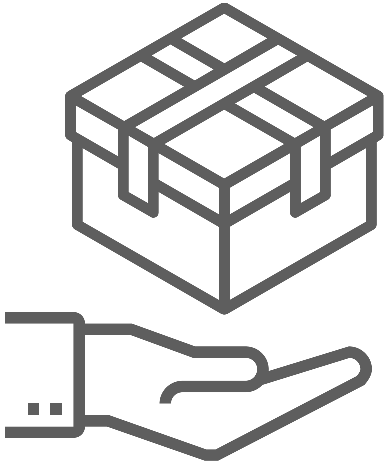
AS OF MONDAY, AUGUST 28, 2023

meederinvestment.com/drive

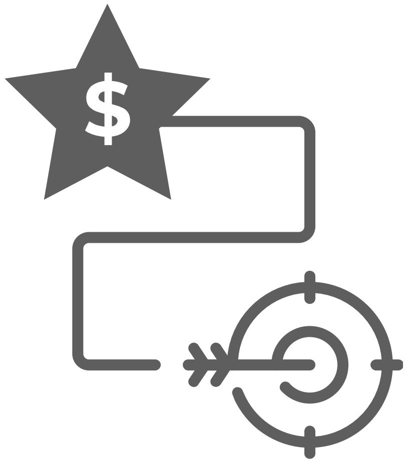
Meeder Tax Managed Strategy

The optimal solution for investors

CUSTOMIZATION

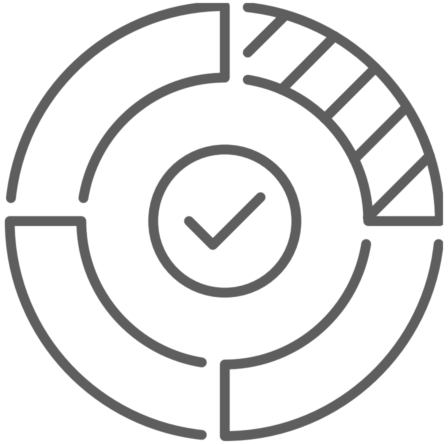


TAX EFFICIENCY



RISK MANAGEMENT

INVESTMENT MANAGEMENT



Benefits of Meeder Tax Managed Strategy

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CUSTOMIZATION AND RISK MANAGEMENT	MEEDER TAX MANAGED STRATEGY
Portfolio is customized to the individual client	✓
Direct ownership of individual stocks	✓
Transfer existing positions in-kind	✓
Manage portfolio around concentrated positions	✓
Ability to include/exclude specific securities and/or sectors	✓
Flexibility to account for all risks – a holistic approach	✓

Our Primary Objective

MEEDER

HELP DRIVE YOUR
CLIENTS' JOURNEYS

TO THEIR ULTIMATE
INVESTMENT DESTINATION

Summary

5 Steps to Optimizing Account Transition Opportunity

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1 **TARGET**

2 **SYNC**

3 **REACH**

4 **RE-INFORCE**

5 **REVIEW**

Q&A

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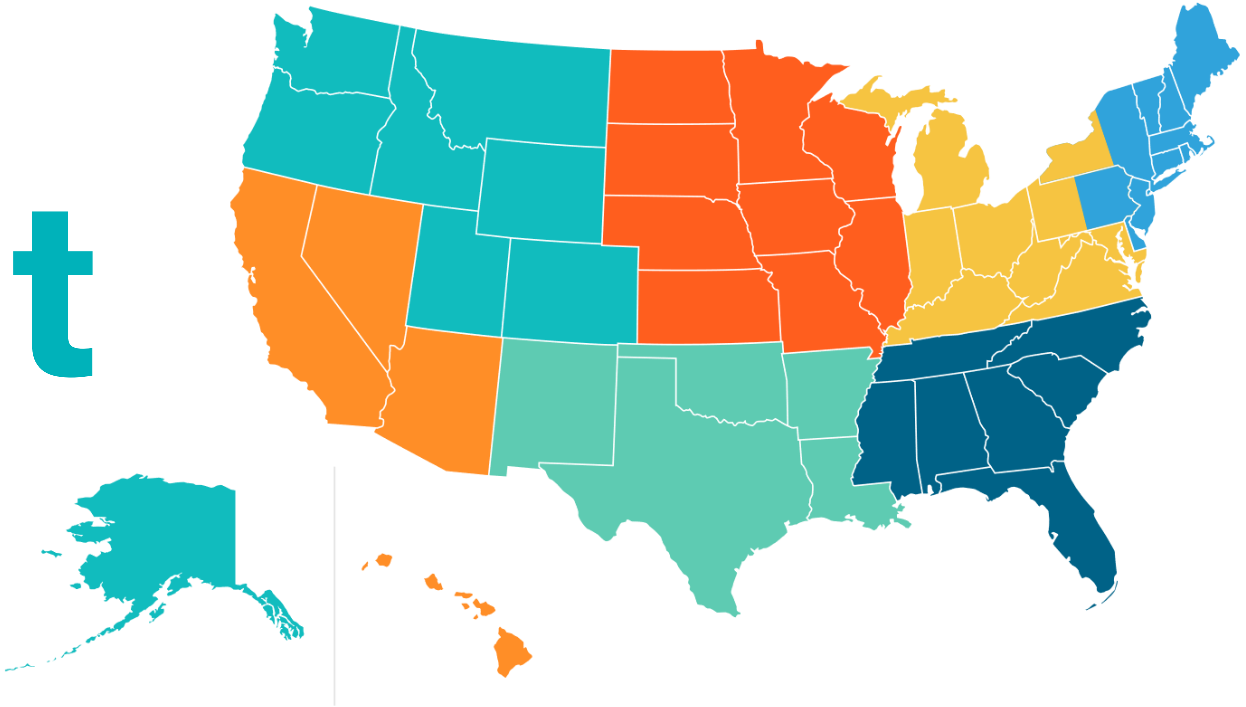
Regional Consultant Coverage



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