



MEEDER WEALTH MANAGEMENT

**Personalized solutions
for your life's journey**



M E E D E R

Private Wealth Portfolios

Aligning with your unique aspirations

Your life's journey is your own. Meeder Private Wealth portfolios help you and your household stay on track to optimize your wealth.

Meeder creates a customized, Separately Managed Account (SMA) designed around your personal goals—considering your outlook, preferences, investment horizon, and risk profile.

Backed by nearly 50 years' investment expertise, Meeder Private Wealth portfolios optimize investing in four ways:

Portfolio Customization



- » Build portfolios to match unique goals and objectives
- » Separate individual and household portfolios, as needed
- » Achieve a greater level of control using Individual equities

Tax Management



- » Actively manage and maximize after-tax wealth
- » Harvest losses to create tax asset
- » Create a unique tax budget for each individual client

Risk Management



- » Manage account in harmony with total household
- » Diversify risks in and outside current portfolio
- » Drive ongoing communication to accommodate changes in outside risk

Investment Management



- » Experienced and deep portfolio management team
- » Transparent and unbiased approach
- » Continual due diligence and investment monitoring

Personalized approach for a better investment experience

Whether you're new to investing, or you're a savvy investor holding multiple accounts, you're seeking to build your wealth while managing risks. But sometimes the possibility of market volatility or triggering capital gains taxes may deter you from building a better, more diversified portfolio. Meeder Private Wealth portfolios mitigate these issues and help optimize outcomes using Separately Managed Accounts (SMAs) for both qualified and non-qualified investing.

Unlike typical ETF and mutual fund investing, Meeder Separately Managed Accounts offer comprehensive customization, risk management and tax-advantaged benefits.

Meeder Private Wealth Portfolio Advantages	SEPARATELY MANAGED ACCOUNTS	INDEX ETF / MUTUAL FUND
Customization & Risk Management		
» Portfolios personalized for individuals and families	✓	X
» Direct ownership of individual stocks	✓	X
» Seamless transfer of existing positions in-kind	✓	X
» Portfolio management around concentrated positions	✓	X
» Choice among specific stocks, sectors and industries	✓	X
» Flexible strategy that adapts to changing risks	✓	X
Tax Management		
» Customized tax budget	✓	X
» Control of capital gains	✓	X
» Ability to distribute capital losses	✓	X
» Dividend reinvestment	Paid as cash	✓
» Increase after-tax returns through tax-minimization strategies	✓	X

Working Together

The process of building and protecting wealth lasts a lifetime. As your strategic partner and fiduciary, your adviser and wealth management team will construct a personalized financial plan to navigate the journey.

1 UNDERSTAND AND EVALUATE

It is important for us to know who you are and what you are trying to accomplish in order to create a customized plan for your unique financial situation.

2 DEFINE YOUR SOLUTION

Personalized solutions are created with each being a critical factor for your success, chosen as a catalyst to achieve your specific goals.

3 IMPLEMENT

Once the appropriate solutions are determined for you or your business, concierge-level service is provided to guide you through each step of the implementation process.

4 MONITOR

Our monitoring process is not just reaffirming your original plan, but a process that continually measures your results and makes adjustments as necessary.

Why Meeder?

Meder Wealth Management has been helping clients successfully reach their financial goals since the firm's inception in 1974.

Located in the heart of Muirfield Village in Dublin, Ohio, Meeder has over 100 professionals dedicated to serving the financial needs of individuals and their families, and is responsible for over \$25 billion in assets. For nearly 50 years Meeder has been providing a wide array of financial products and services to address nearly any financial need. Regardless if planning for retirement, stock market volatility, rising healthcare costs, or outliving assets are a concern, Meeder provides solutions that are designed to help investors as they accumulate, preserve and distribute their wealth.



CONTACT US TODAY TO SPEAK WITH AN ADVISOR

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Private Wealth portfolios may not be suitable for all investors. Investing in securities involves inherent risks, including the risk that you can lose the value of your investment. Past performance does not guarantee future results and there can be no assurance that any investment strategy will achieve its objectives, generate positive returns, or avoid losses. The amount and type of investment restrictions must be reasonable and are subject to acceptance by the adviser. Meeder does not provide tax advice and does not represent that any portfolio design will result in a particular tax consequence. Prospective investors should consult with their personal tax advisors regarding their specific situation and circumstances.

Investment advisory services offered by Meeder Advisory Services, Inc.

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