



M E E D E R

6125 Memorial Drive, P.O. Box 7177, Dublin, OH 43017
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meederfunds.com | funds@meederinvestment.com

Meeder Funds Transfer Request Form

INSTRUCTIONS

STEP 1: COMPLETE APPLICATION

Complete the Meeder Funds Account or IRA Account Application. Keep one copy for your records. A new application is not required if transferring to an existing Meeder Funds account.

For IRA SEP Accounts:

Complete IRS Form 5305-SEP to establish the plan, and a Meeder Funds IRA Account Application for each participant.

STEP 2: COMPLETE TRANSFER FORM

Please complete Sections 1 through 5 on the following page 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, 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 questions, please call Client Services at 1.800.325.3539.

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	
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 transfer from the current fund company or trustee to the Meeder Funds

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 FAX NUMBER*

*Please include fax number for faster submission to resigning trustee.

3. MEEDER FUNDS ACCOUNT

Transfer to: New Meeder Funds Account
(Enclose a Meeder Funds Application)
Existing Meeder Funds Account
Account # _____

4. INVESTMENT SELECTION

Fund	Investment
Balanced Fund	\$ _____
Conservative Allocation Fund	\$ _____
Dynamic Allocation Fund	\$ _____
Global Allocation Fund	\$ _____
Institutional Prime Money Market Fund	\$ _____
Moderate Allocation Fund	\$ _____
Muirfield Fund	\$ _____
Quantex Fund	\$ _____
Spectrum Fund	\$ _____
Tactical Income Fund	\$ _____

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 Funds account for investment in accordance with my standing instructions.

YOUR SIGNATURE

DATE

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

SIGNATURE GUARANTEE BOX

(FOR INTERNAL USE ONLY)

Instructions for delivery to the Meeder Funds:

Please refer to the instructions for delivery to Mutual Funds Service Co. Instructions will be provided by Mutual Funds Service Co. Client Services when submitting to the sending financial institution.

Letter of Acceptance:

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 5.

ACCOUNT NO.

FBO

AUTHORIZED SIGNATURE

DATE