

## INSTRUCTIONS

<b>Step 1: Complete Application</b>
<p>Complete the Meeder Funds New Account or IRA Account Application. Keep one copy for your records.</p> <p><u>For IRA SEP Accounts:</u> Complete IRS Form 5305-SEP to establish the plan, and a Meeder Funds IRA New Account Application for each participant.</p>
<b>Step 2: Complete Transfer Form</b>
<p>Please complete Sections 1 through 5 of this Transfer Request Form.</p> <p>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.</p> <p>Retain one copy of this form for your records.</p>
<b>Step 3: Mail Application and Transfer Form</b>
<p>Mail completed forms to:</p> <p>Meeder Funds c/o Mutual Funds Service Company, P.O. Box 7177, Dublin, OH 43017.</p>
<b>Step 4: Receipt of Purchase Confirmation</b>
<p>The Transfer Agent for the Meeder Funds will arrange for the transfer of your current plan's assets.</p> <p>Once your account has been established, a confirmation statement will be sent.</p>

**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 \_\_\_\_\_

**3. MEEDER FUNDS ACCOUNT**

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

Existing Meeder Funds Account  
Account # \_\_\_\_\_

**4. INVESTMENT SELECTION**

**Portfolio**

Previously selected portfolio      \$ \_\_\_\_\_

**Fund**

- 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 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 Box

**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.

**Make check payable to: Meeder Funds [List Name of the Fund/Portfolio]**

**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 \_\_\_\_\_