

Shareholder Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Phone Number: \_\_\_\_\_

**Please check the box that corresponds to your desired New Model Portfolio.**
**Tactical Portfolios**

- Conservative
- Moderate Conservative
- Balanced
- Moderate Growth
- Growth
- Aggressive Growth

**OR**
**Strategic Portfolios (equity– fixed income ratio)**

- 95 - 5
- 90 - 10
- 80 - 20
- 70 - 30
- 60 - 40
- 40 - 60
- 30 - 70

By signing below, I acknowledge that I understand the investment strategies and risk profile of the new model portfolio I am choosing, or I have discussed my options with the financial representative for my account.

This signed form may be faxed, scanned/emailed or mailed back to Meeder.

- For FAX delivery: (614) 766-6669
- For scanned/email delivery: [clientservices@meederinvestment.com](mailto:clientservices@meederinvestment.com)
- For mail delivery: Meeder Investment Management, 6125 Memorial Drive, Dublin, OH 43017 - Attention: Client Services

 \_\_\_\_\_  
**Shareholder Signature (Required)**

 \_\_\_\_\_  
**Date (Required)**

 \_\_\_\_\_  
**Name (Please Print)**

 \_\_\_\_\_  
**Email Address**

 \_\_\_\_\_  
**Joint Shareholder Signature (Required)**

 \_\_\_\_\_  
**Date (Required)**

 \_\_\_\_\_  
**Joint Name (Please Print)**

 \_\_\_\_\_  
**Email Address**
**FOR QUESTIONS PLEASE CALL CLIENT SERVICES AT (866) 633-3371**