

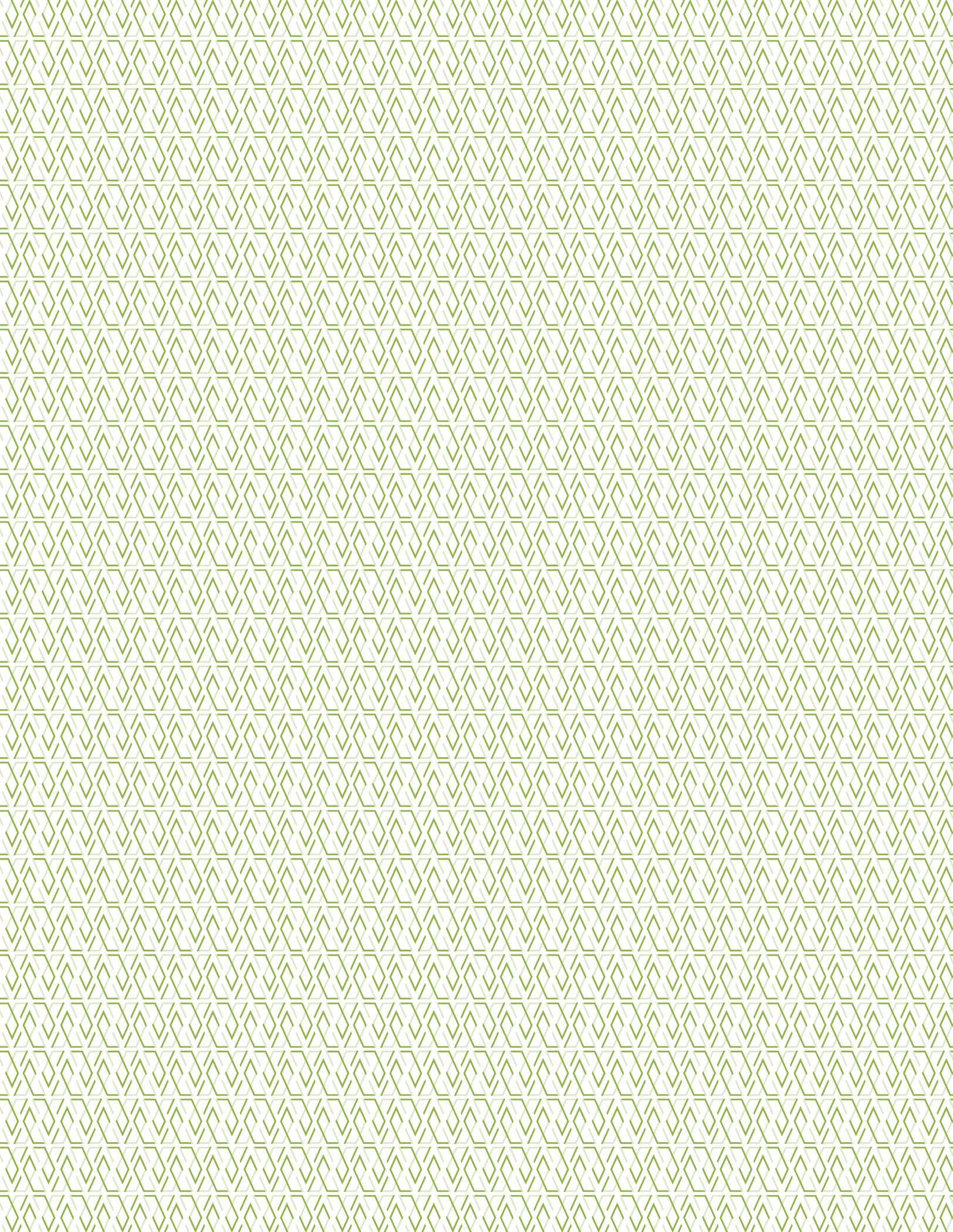


MEEDER WEALTH MANAGEMENT

# Customized solutions designed with you in mind



MEEDER



# Working Together

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

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- 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.
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## Why Meeder?

Meeder 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**

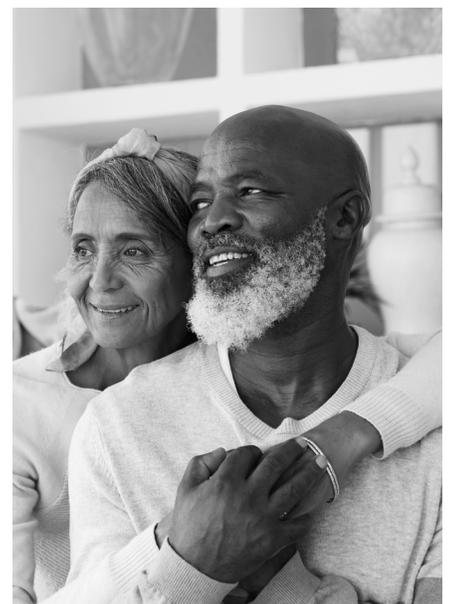
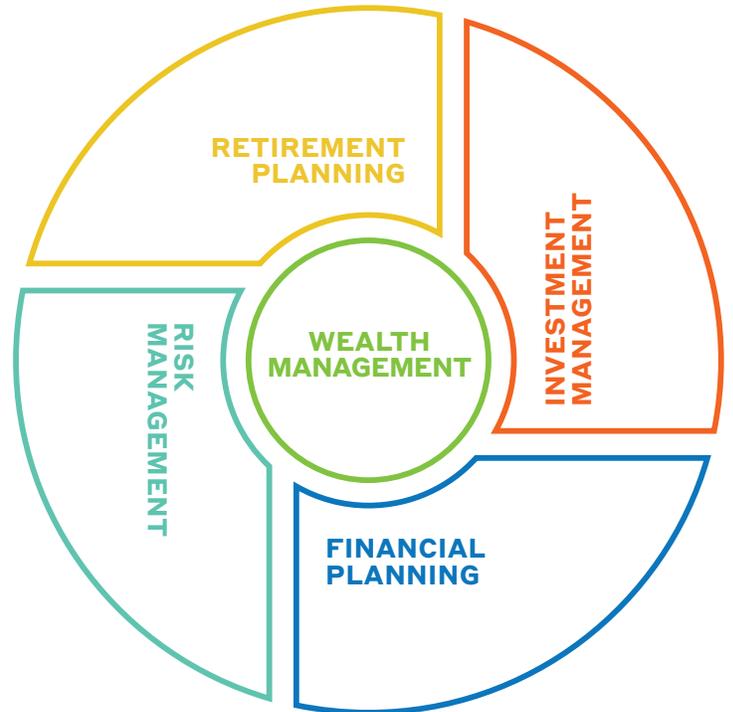
1.866.633.3371 | [wealthmanagement@meederinvestment.com](mailto:wealthmanagement@meederinvestment.com)

# Meeder Wealth Management

As you achieve your goals, your financial life becomes more complex. You know where you want to go, but how do you get there?

## FINDING THE RIGHT PARTNER IS A KEY STEP TO CHARTING THE COURSE FOR YOUR FINANCIAL JOURNEY

At Meeder Wealth Management, we work with you as your advocate, your trusted resource, and your partner. We specialize in the wealth management needs of families as well as institutions, and we coordinate our services with the other members of your team such as CPAs and attorneys. From helping you invest and protect your assets, to identifying strategies for wealth transfer and charitable giving, to managing your institution's financial needs, we're here to serve you.





## Wealth Management

### COMPREHENSIVE FINANCIAL PLANNING

Having the right plan is essential to reaching any goal and your financial future is no different. Looking at your needs from a holistic view is important when identifying your path. Your adviser works with you to develop a comprehensive financial plan that utilizes industry leading tools. Planning for retirement, saving for college, managing your risks and planning for the distribution of your estate can all be accomplished by starting with the right plan.

- » Financial Planning
- » Retirement
- » College Savings
- » Retirement Income Distribution
- » Investment Planning
- » Risk Management
- » Estate Planning

## Retirement Planning

Many people spend more time planning their next vacation than they do their retirement. All the things associated with planning for retirement can make the task seem very overwhelming. Retirement means something different for everyone. We work alongside you to understand what you envision your retirement to look like, and then establish an in-depth plan to make your dreams a reality.

- » 401(k), 403(b), 457(b)
- » Pension Analysis
- » IRAs
- » Medicare Benefits
- » Social Security Analysis

## Risk Management

Risk management is an essential element of the financial planning process. Evaluating your entire situation allows us to protect you and your family's financial future by ensuring that your goals are achieved, even if you experience unexpected life events along the way.

- » Life Insurance
- » Disability Insurance
- » Long-term Care

## Estate Planning

Proper considerations and planning is vital for an effective estate plan to be put into place. Without it, your assets may be distributed to unintended recipients, access to financial resources may be delayed, and critical decisions related to your medical treatment and property ownership may result in unnecessary problems. Meeder partners with trusted estate planning attorneys that specialize in protecting your assets and creating a legacy for generations to come.

- » Trusts
- » Powers of Attorney
- » Lifetime Gifting Strategies
- » Living Wills
- » Last Will and Testaments

# Investment Management

## INVESTMENT PLANNING

Investment planning involves far more than just selecting investment options. We work with you to help identify and prioritize your goals and objectives, as well as review your time horizon and risk tolerance to make sure that your portfolio is properly designed. We then determine what allocation of strategic and tactical investment management may be appropriate for your individual situation. The final step involves determining which investment vehicles should be utilized in the creation of your investment portfolio.

[Stocks](#) » [Bonds](#) » [Mutual Funds](#) » [ETFs](#)

## INVESTMENT PORTFOLIOS

### GROWTH STRATEGY

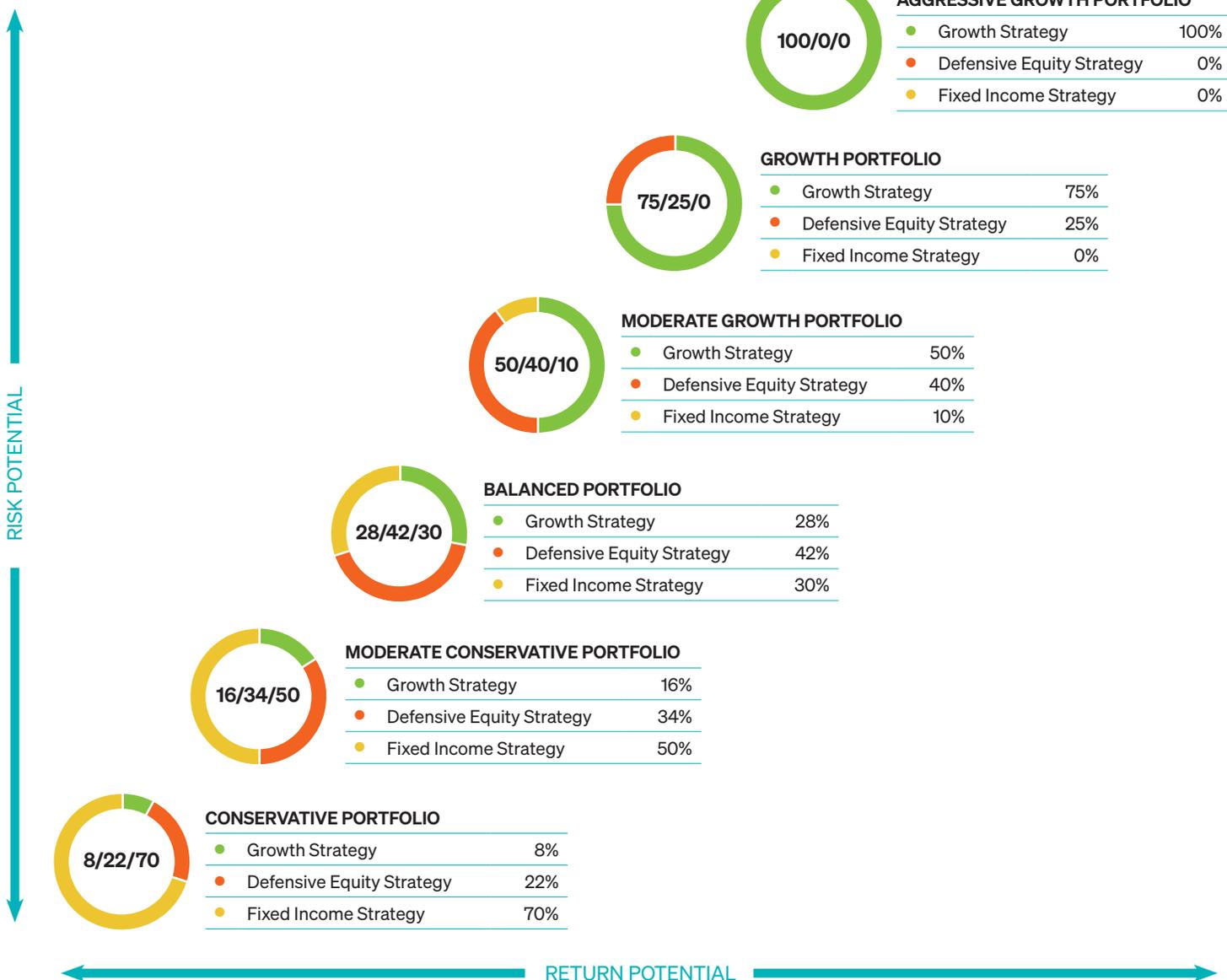
Our fully invested equity strategy combines strategic and tactical disciplines. The strategic portion of the portfolio applies target allocations to multiple asset classes. Conversely, the tactical segment can shift exposure among equity securities, including sector over and underweights, international markets, and capitalization ranges.

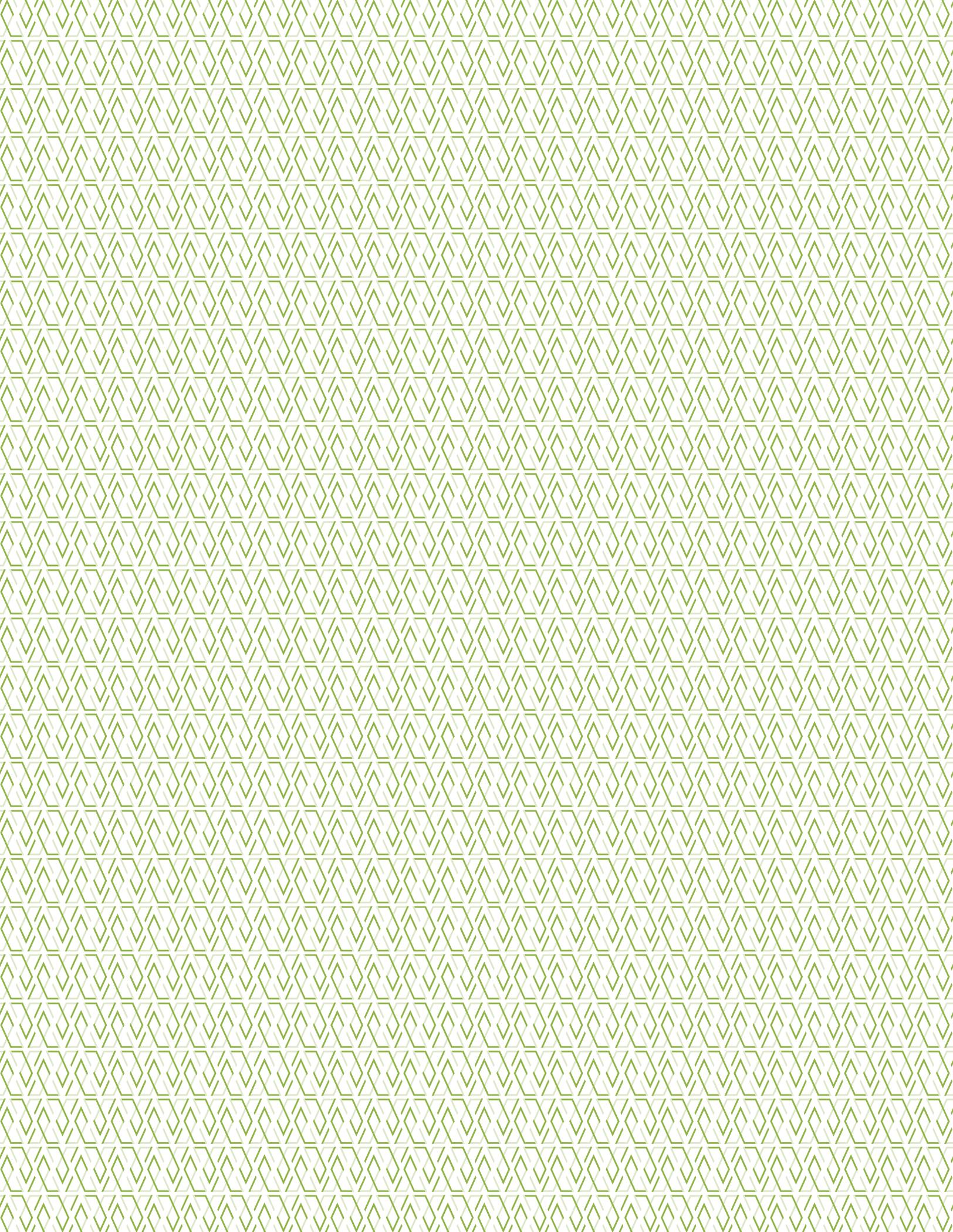
### DEFENSIVE EQUITY STRATEGY

Our defensive strategy combines strategic and tactical disciplines that shift from equity securities to cash or fixed income securities when the risk/reward relationship of the stock market is deemed unfavorable.

### FIXED INCOME STRATEGY

Our bond strategy can shift between U.S. government and agency securities, investment-grade bonds, high-yield corporate bonds, and emerging market debt. It also incorporates duration management to efficiently position the portfolio for changes in interest rates.







**M E E D E R**  
**WEALTH MANAGEMENT**

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Portfolio allocation, opinions and forecasts regarding markets, securities, products, portfolios or holdings are given as of the date provided and are subject to change at any time. Asset allocation and diversification do not assure a profit or protect against loss. All investments carry a certain amount of risk and there is no guarantee that any strategy will achieve its investment objective. Past performance is no guarantee of future results.

Average Investor returns generated from data supplied by unaffiliated third-parties. U.S. Equities are represented by the S&P 500 Index. Bonds are represented by the Bloomberg Barclays Aggregate Bond Index. Home returns are represented by S&P CoreLogic Case-Shiller US National Home Price Index. Inflation is represented by the Consumer Price Index NSA. Average investor return is represented by Dalbar's average asset allocation investor return, which utilizes the net of aggregate mutual fund sales, redemptions and exchanges each month as a measure of investor behavior. Returns are annualized over the indicated period.

Investment advisory services offered by Meeder Asset Management, Inc.

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