



MEEDER

MEEDER EDGE | RETIREMENT PLAN SERVICES

# Customized retirement plan services designed to grow your business



# Meeder Edge Retirement Plan Services

Partnering to help grow your retirement plan business and meet sponsors' needs

---

## **CUSTOMIZED AND HOLISTIC RETIREMENT PLAN SERVICES**

Longer lifespans, high inflation, and low interest rates are top concerns among financial advisors' clients when it comes to retirement. Further, the retirement plan landscape continues to evolve with increased regulation, a greater selection of investment options, and the need to keep fees competitive.

Meeder Edge Retirement Plan Services support the sales and servicing of your retirement plan business. We provide customized retirement plans and investment portfolios to assist retirement plan sponsors and trustees. The outcome is to help grow your retirement practice and enable plan participants to achieve a more secure and comfortable financial future.

Meeder has a long and extensive history of working with retirement plans, dating back to our first clients. We invite you to put our holistic, time-tested approach to investment management and our nearly 50 years of investment experience to work for you.



## Leverage a Proven Advisory Process

Meeder Edge Retirement Plan Services utilize a holistic and flexible platform that allows advisors to deliver customized retirement plan solutions to meet the unique needs of plan sponsors and their participants.

Your Meeder Edge Retirement Plan Services team serves as the retirement plan expert for plan consultation and review and assists plans in building teams to meet their unique needs. This allows your plan sponsor clients to limit their fiduciary roles and focus more on running their organizations.

Under your guidance, Meeder brings ideas to continually assess, improve, and optimize the success of the plan's strategy and design. Meeder assists trustees to design the plan's investment policy and to select the investment options. Meeder can help select the recordkeeper and third-party administrator as well as facilitate the conversion of plan assets if a new provider is selected.



## Focus on Plan Participants

Meeder helps ensure that plan participants gain the best outcomes from their employer-sponsored retirement planning benefits. In conjunction with the plan's advisor, we assist participants during all phases of retirement planning—through accumulation, preservation and distribution of funds.

Meeder is committed to growing employees' participation in the sponsor's plan and increasing the participants' satisfaction levels. We work with the plan advisor to help guide participants from enrollment assistance and education, to distribution and rollover planning.



## Choose from a wide array of retirement plan services and solutions

Meeder offers a range of solutions for plan sponsors and participants to support the sales and servicing of your retirement plan business.

---

### MANAGED ACCOUNTS

- » Professional money management for the “do it for me” investor
- » A selection of Risk-based and Age-based portfolios

---

### TACTICALLY MANAGED FUNDS

- » Meeder’s Defensive Equity strategy delivers funds across a broad risk/return spectrum
- » Balanced funds can be utilized as a Qualified Default Investment Alternative (QDIA)

---

### FIDUCIARY SERVICES

- » Oversight and governance with robust quarterly reporting and monitoring
- » Investment selection across a range of asset classes and investment options

---

### CONSULTING SERVICES

- » Assistance with plan governance, compliance and risk management
  - » Service provider benchmarking and investment menu analytics
- 





# Leverage proven expertise in creating and managing investment solutions

We partner with you to understand the needs of your clients—both at the plan sponsor level and at the participant level.

Meeder's seasoned investment management team takes a multi-discipline/multi-factor approach to investment management. Meeder employs core investment strategies in order to design portfolios utilizing a range of investment vehicles, including mutual funds and ETFs. In addition, our team is skilled at reviewing and monitoring investment options using screening criteria and analysis to help you and your clients choose the optimal solutions that can lead to improved investment outcomes.



## MEEDER EDGE RETIREMENT PLAN SERVICES OFFERINGS

Meeder offers advisory firms highly customized retirement planning services aligned with the individual goals of each plan-sponsor client, and generally include:

- » Retirement plan product/platform selection and on-going monitoring
- » Assistance with selection and monitoring of a third-party Plan Administrator, if needed
- » Investment policy statement preparation and review on an annual basis
- » Investment selection and establishing criteria for monitoring investments
- » Fiduciary reviews and ERISA 404(c) compliance consultation
- » Plan trustee reviews which are typically provided on a quarterly or semi-annual basis
- » Participant/employee enrollment and education meetings generally provided on a quarterly or semi-annual basis; formats include group presentations and individual participant meetings



# We're Here. With You, For You.

Meeder is a trusted advisor to advisors, aspiring to be your partner in providing services and support to grow your retirement business. We will work with you to create customized retirement plan solutions designed for your business, to help you be more efficient and productive.

Your clients are unique, and we understand the importance of customization. When you partner with Meeder, our ability to meet your needs and exceed your expectations drives the long-term success of our partnership.

**THE MEEDER EDGE RETIREMENT PLAN SERVICES TEAM IS COMMITTED TO BRINGING YOU THE FULL RESOURCES OF OUR FIRM TO HELP YOU:**



Build scale and provide efficiency



Deliver business development support, research and timely advice



Create customized investment strategies and solutions



Meet rigorous regulatory needs



Innovate and grow your practice

---

## Solutions for a Complex Retirement Plan Environment

The retirement landscape continues to evolve with increased regulation, a multitude of investment options, and a continued focus on providing competitive fees.

Meeder remains committed to the needs of retirement plan sponsors and participants since the firm's inception in 1974. Our first clients were retirement plan sponsors, and we continue to work with these groups today—both individually and alongside financial advisors. Meeder's experience in the retirement marketplace, combined with a time-tested approach to investment management and nearly 50 years of investment experience, makes us a partner you can count on to help you capture opportunities and grow your business.





**M E E D E R**  
**ADVISOR CONSULTING**

6125 Memorial Drive, Dublin, Ohio 43017 | [meederadvisorconsulting.com](http://meederadvisorconsulting.com) | 866.633.3371

Investment advisory services offered by Meeder Advisory Services, Inc.

© 2022 Meeder Investment Management

0016-MAS-9/14/22-28139