



MEEDER

MEEDER INVESTMENT MANAGEMENT

Firm Overview

When Meeder was founded nearly 50 years ago, it was established with our clients and partners in mind. We aspire to be your trusted advisor by learning what is most important to you and your business, being sure we are in alignment with your priorities, and most importantly, demonstrate our understanding of your needs through our actions, assisting you to capitalize on opportunities as they arise, and helping solve challenges.

We have successfully navigated market cycles with clients for nearly five decades and through nearly every type of market environment. Our time-tested experience has driven our deep understanding of the importance of taking a holistic approach to managing investments to help you achieve your unique investment goals.

NEARLY 50 YEARS

Nearly half a century of managing investments means we have seen just about every type of market environment.

We understand how to help you anticipate what lies ahead for smart investing opportunities.

+\$45 BILLION

Public entities, institutions, financial advisors and individual investors like you have trusted our team with \$45 billion of assets under advisement as of December 31, 2021.

125 ASSOCIATES

When working with Meeder you will be able to access the collective knowledge of over 125 dedicated associates on our investment, service and distribution teams.

Meeder History

Since 1974, we have committed to delivering on this principle—providing public entities, institutions, financial advisors and individual investors with customizable solutions. We have grown our team and capabilities to deliver an expanded suite of investment offerings including mutual funds, investment portfolios, separately managed accounts and cash management solutions.

Whoever you are, whomever you serve, wherever you are going—we are here. With you, for you. As a trusted partner, we are committed to helping you achieve your goals.

Meeder's longevity is driven by a strict adherence to our founding principle: **to provide investment solutions designed to improve investor outcomes.** This founding principle has helped us successfully navigate every market and economic cycle over our history. Our success is also attributable to our associates, who serve our clients each day according to our core values:

 Integrity

 Passion

 Discipline

 Excellence

 Results

Meeder Solutions

Meeder offers unique ways to engage our organization using a client-centric approach. We structure our solutions around you, ensuring that you are involved every step of the way.

TURNKEY SOLUTIONS

FUNDS	PORTFOLIOS	RETIREMENT PLANS
Tactical Allocation	Tactical Risk-Based	Model Portfolios
Equity / Specialty	Tactical Non-Prop Risk-Based	Unitized Portfolios
Global / International	Target Withdrawal Portfolios	Fiduciary Services
Fixed Income	Tactical Age-Based	
Money Market		

CUSTOMIZED SOLUTIONS

PRIVATE WEALTH	MEEDER EDGE INVESTMENT CONSULTING	MEEDER EDGE RETIREMENT PLANS	PUBLIC & PRIVATE INSTITUTIONS
Risk Management	Portfolio Comparison Analysis	Open Architecture Solutions	Operating Funds
Tax Management	Model Oversight		Project Funds
Income Management	IPS Creation & Monitoring		Credit Research
	Portfolio Analytics		
	Trade Recommendations		

Why Meeder?

Meeder 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 125 professionals dedicated to serving the financial needs of individuals and their families. 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 LEARN MORE

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Investing in securities involves inherent risks, including the risk that you can lose the value of your investment. Prospective investors should contact their financial adviser for more information about Meeder Solutions suitable for their circumstances. Meeder Investment Management is the marketing brand and holding company for the Meeder group of affiliated companies. Investment advisory services are offered through Meeder Asset Management, Inc.; Meeder Advisory Services, Inc. and Meeder Public Funds, Inc. Mutual funds are distributed by Meeder Distribution Services, Inc., Member FINRA.