MEEDER PRIVATE WEALTH

Personalized solutions tailored to an investor's unique objectives

MEEDER

Meeder Private Wealth

Creating optimal solutions for investors

Sophisticated investors can present complex challenges. Meeder Private Wealth helps financial advisors capture business and gain efficiency with personalized investment solutions specially created for affluent clients.

Meeder creates a customized, Separately Managed Account (SMA) designed around each investor's personal goals—considering their risk profile, investment horizon, tax management needs, income, and more.

Backed by nearly 50 years' investment expertise, Meeder Private Wealth portfolios optimize investing in four ways:

Portfolio Customization

- Build portfolios to match unique goals and objectives
- Create a separate portfolio for each client
- Achieve a greater level of control using Individual equities

Tax Management

- Actively manage and maximize after-tax wealth
- Harvest losses to create tax asset
- Create a unique tax budget for each individual client

Risk Management

- Manage account in harmony with total household
- Diversify risks in and outside current portfolio
- Drive ongoing communication to accommodate changes in outside risk

Investment Management

- Experienced and deep portfolio management team
- No proprietary products
- Continual due diligence and investment monitoring

Differentiated solutions for a better client experience

Affluent clients are seeking unique ways to continue to build wealth and manage risks. They are looking for alternatives to traditional investment vehicles like index ETFs or mutual funds. However, the possibility of market volatility or triggering high capital gains taxes may deter them from building better, more diversified portfolios. Meeder Private Wealth offers Separately Managed Accounts to help mitigate these issues and optimize outcomes for both qualified and non-qualified investing.

Unlike typical ETF and mutual fund investing, Meeder Separately Managed Accounts offer comprehensive customization, risk management and tax-advantaged benefits.

Meeder Private Wealth: Delivering Client Advantages		MEEDER PRIVATE WEALTH	INDEX ETF / MUTUAL FUND
Customization & Risk Management	» Portfolios personalized for individual clients	✓	X
	» Direct ownership of individual stocks	✓	X
	» Seamless transfer of existing positions in-kind	✓	X
	» Portfolio management around concentrated positions	✓	X
	» Choice among specific stocks, sectors and industries	✓	X
	» Flexible strategy that adapts to changing risks	✓	X
Tax Management	» Customized tax budget	✓	X
	» Control of capital gains	✓	X
	» Ability to distribute capital losses	✓	X
	» Dividend reinvestment	Paid as cash	✓
	» Increase after-tax returns through tax-minimization strategies	✓	X

Collaborating from discovery to deliver

Meeder's proven 5-step private wealth process ensures we gain a deep understanding of your client's financial situation—so we can personalize a portfolio based on market, risk, and lifestyle parameters.

DISCOVERY

Understand client's unique needs and objectives.

DIAGNOSIS

Create a detailed, data-driven proposal.

DESIGN

Develop custom investment portfolio.

DEPLOY

Validate portfolio and manage deployment.

DELIVER

Provide active management and fiduciary oversight.

YOUR SUCCESS. OUR EXPERTISE.

We understand each investor has unique needs. Meeder Investment Management's rich history of success comes from our commitment to understanding these differences and creating solutions to solve them. Our flexible approach allows us to be nimble and provide the personalized service that each investor needs as financial markets and circumstances evolve.

We stand ready to help individuals, advisors, and institutions meet the complexities of today to provide better outcomes tomorrow.

Contact us today to learn how you can benefit from our unique expertise.

WITH YOU. FOR YOU.

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Meeder Private Wealth may not be suitable for all investors. Investing in securities involves inherent risks, including the risk that you can lose the value of your investment. Past performance does not guarantee future results and there can be no assurance that any investment strategy will achieve its objectives, generate positive returns, or avoid losses. The amount and type of investment restrictions must be reasonable and are subject to acceptance by the adviser. Meeder does not provide tax advice and does not represent that any portfolio design will result in a particular tax consequence. Prospective investors should consult with their personal tax advisors regarding their specific situation and circumstances.

Investment advisory services offered by Meeder Advisory Services, Inc.

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