

Meeder Retirement Portfolios Portfolio Change Request Form

PARTICIPANT NAME

PLAN NAME

PLAN NUMBER

SOCIAL SECURITY NUMBER

PHONE NUMBER

Please check the box that corresponds to your desired portfolio.

Investment Strategy Portfolios

Conservative
Moderate Conservative
Balanced Income
Balanced
Balanced Growth
Moderate Growth
Growth
Aggressive Growth

OR

Age-Based Portfolios

Birth Year: _____

You will be placed into the Age-Based Portfolio that coincides with your current age. As you move closer to the average retirement age of 65, we will automatically move your assets to the next most conservative portfolio.

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

This change will be reflected within (10) business days of receipt by the investment manager.

This signed form may be faxed, mailed or emailed to the investment manager.

- » For fax delivery: 614.791.2572
- » For email delivery: clientservices@meederinvestment.com
- » For mail delivery: Meeder Investment Management, 6125 Memorial Drive, Dublin, OH 43017 – Attention: MRP Operations

PARTICIPANT SIGNATURE (REQUIRED)

DATE (REQUIRED)

NAME (PLEASE PRINT)

EMAIL ADDRESS