



M E E D E R

6125 Memorial Drive, P.O. Box 7177, Dublin, OH 43017  
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meederfunds.com | funds@meederinvestment.com

# Meeder Funds Transfer Request Form

## INSTRUCTIONS

### STEP 1: COMPLETE APPLICATION

Complete the Meeder Funds Account or IRA Account Application. Keep one copy for your records. A new application is not required if transferring to an existing Meeder Funds account.

**For IRA SEP Accounts:**

Complete IRS Form 5305-SEP to establish the plan, and a Meeder Funds IRA Account Application for each participant.

### STEP 2: COMPLETE TRANSFER FORM

Please complete Sections 1 through 5 on the following page of this Transfer Request Form.

**NOTE:** All written instructions given to the resigning custodian may require your signature guaranteed by one of the following: a commercial bank; trust company; or a member of a national securities exchange. Check with your resigning custodian for their requirements.

Retain one copy of this form for your records.

### STEP 3: MAIL APPLICATION AND TRANSFER FORM

Mail completed forms to:

Meeder Funds, P.O. Box 7177, Dublin, OH 43017.

### STEP 4: RECEIPT OF PURCHASE CONFIRMATION

The Transfer Agent for the Meeder Funds will arrange for the transfer of your current plan's assets.

Once your account has been established, a confirmation statement will be sent.

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**If you have questions, please call Client Services at 1.800.325.3539.**

## 1. SHAREHOLDER INFORMATION

NAME SOCIAL SECURITY NUMBER

ADDRESS

CITY STATE ZIP

HOME PHONE WORK PHONE

## 2. CURRENT ACCOUNT INFORMATION

Type of account to be transferred:

Individual	Joint	UGMA
Individual Trust	Corporation	
Traditional IRA	Roth IRA	Qualified Plan or TSA
Spousal IRA	Education IRA	SEP-Simplified
Rollover IRA	SIMPLE IRA	Employee Pension

COMMINGLING AUTHORIZATION – I understand that commingling contributions from a qualified plan or TSA with regular IRA contributions will prohibit me from rolling these funds into another qualified plan or TSA in the future.

With this knowledge:

I authorize the transfer from the current fund company or trustee to the Meeder Funds

I authorize the commingling of my regular IRA and rollover IRA funds.

I do not authorize the commingling of my regular IRA and rollover IRA funds.

Transfer from: (Please complete entirely)

NAME OF RESIGNING TRUSTEE

ACCOUNT NUMBER

ADDRESS

CITY STATE ZIP

PHONE NUMBER FAX NUMBER\*

\*Please include fax number for faster submission to resigning trustee.

## 3. MEEDER FUNDS ACCOUNT

Transfer to: New Meeder Funds Account  
(Enclose a Meeder Funds Application)  
Existing Meeder Funds Account  
Account # \_\_\_\_\_

## 4. INVESTMENT SELECTION

Fund	Investment
Balanced Fund	\$ _____
Conservative Allocation Fund	\$ _____
Dynamic Allocation Fund	\$ _____
Global Allocation Fund	\$ _____
Institutional Prime Money Market Fund	\$ _____
Moderate Allocation Fund	\$ _____
Muirfield Fund	\$ _____
Sector Rotation Fund	\$ _____
Spectrum Fund	\$ _____
Tactical Income Fund	\$ _____

## 5. AUTHORIZATION OF TRANSFER

To Resigning Trustee or Custodian:

Please liquidate all part (\$ \_\_\_\_\_ or \_\_\_\_\_%) of the account listed in Section 2, and transfer the proceeds of the liquidation to my Meeder Funds account for investment in accordance with my standing instructions.

YOUR SIGNATURE

DATE

**An important note:** Your resigning trustee or custodian may require your signature to be guaranteed. Call them for requirements.

SIGNATURE GUARANTEE BOX

## (FOR INTERNAL USE ONLY)

### Instructions for delivery to the Meeder Funds:

Please refer to the instructions for delivery to Mutual Funds Service Co. Instructions will be provided by Mutual Funds Service Co. Client Services when submitting to the sending financial institution.

### Letter of Acceptance:

Mutual Funds Service Co. will accept the transfer described above. Please liquidate and transfer, on a fiduciary to fiduciary basis, all or part of the designated account as instructed in Section 5.

ACCOUNT NO.

FBO

AUTHORIZED SIGNATURE

DATE