

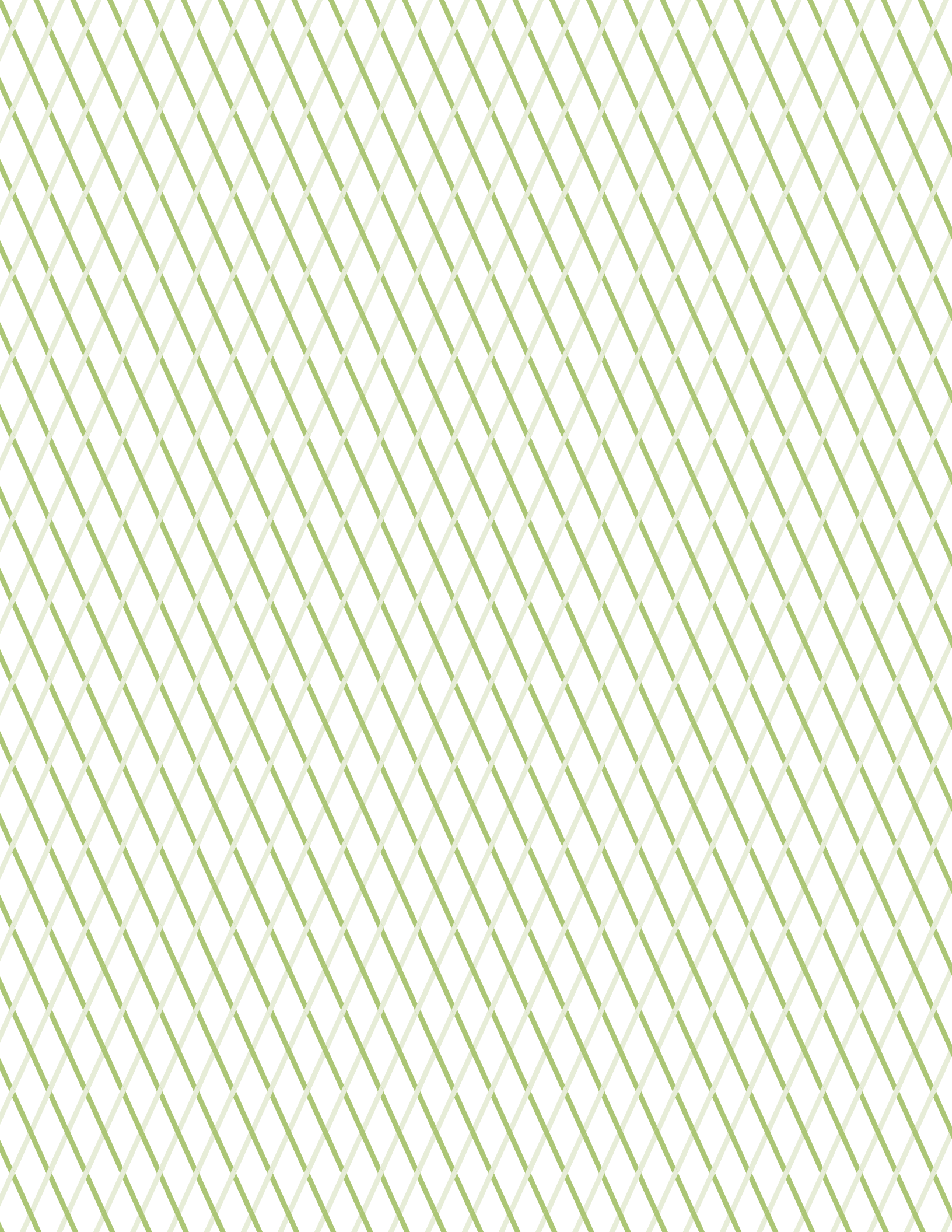


MEEDER WEALTH MANAGEMENT

# Institutional Investment Solutions



MEEDER



# A Partnership Focused on Your Success

## Working With You, For You

Our goal is to design an investment portfolio specifically built to meet your needs. In order to accomplish this, we believe it is extremely important that our investment process is centered around collaboration. This approach helps us to gain a true understanding of the unique circumstances and needs of your entity before any investments are ever executed. Additionally, it allows you to remain up to speed and have vital input into the strategies that will be activated to fit your needs and the changing market environment.

## A Process Built Around You

We know that every client has unique investment needs and objectives. That is why our investment process begins with taking the time to understand your investment policy and future cash flow needs. We are here with you, for you.

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- 01 INVESTMENT POLICY**  
 Your Investment Policy is reviewed or established in accordance your firm's objectives and risk parameters.

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  - 02 CASH FLOW ANALYSIS**  
 Cash flows are analyzed to ensure that we have a comprehensive understanding of your future needs.


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  - 03 ECONOMIC OUTLOOK**  
 Strategies are focused upon building a portfolio that is best positioned for today's dynamic market environment.

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  - 04 PORTFOLIO MANAGEMENT**  
 We construct and actively manage your portfolio to the investment policy, while adapting to current market conditions.

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  - 05 ONGOING COMMUNICATION AND SUPPORT**  
 We pride ourselves on being viewed as an extension of your staff, providing timely reporting and updates on changing conditions.
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We work with you to develop a portfolio designed to meet your unique needs.

# Building a Comprehensive Investment Portfolio

## CASH MANAGEMENT

Our cash management programs are specifically designed to meet the needs of institutional investors. Our team works with you to design a custom strategy focusing on high-quality investments that provide liquidity with competitive yields.

## CUSTOM PORTFOLIO MANAGEMENT

Meeder provides customized separate account portfolios that are as unique as our clients themselves. They are designed to achieve your investment goals with a focus on risk management, investment selection and tax efficiency.

## RETIREMENT PLAN MANAGEMENT

Meeder's plan advisory services provide an overall plan governance program to ensure the unique needs of plan sponsors and participants are met. Our 3(38) investment fiduciary services allow you to focus on delivering a highly successful plan while removing the burden of investment selection and monitoring.

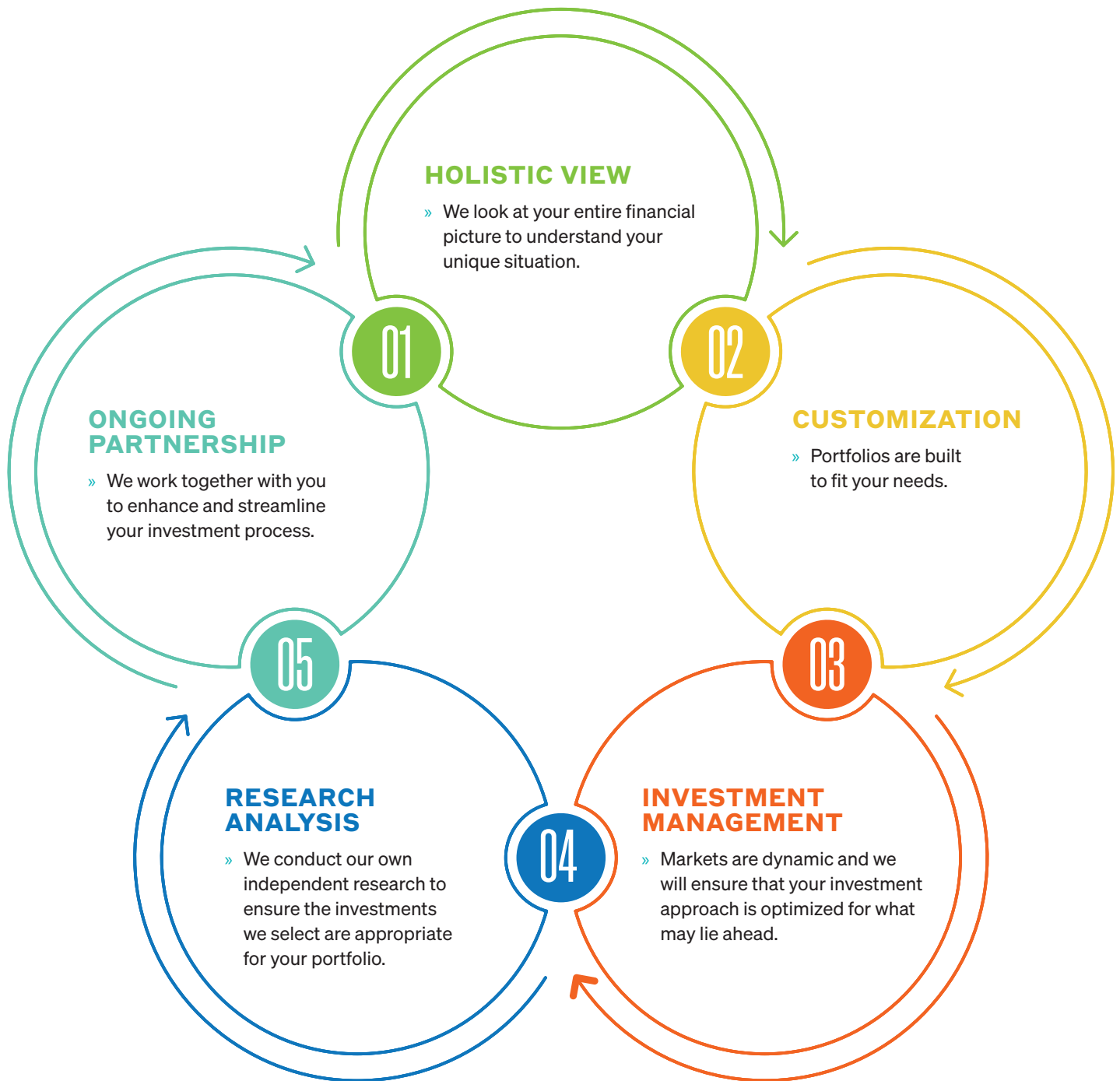
## CONSULTING SERVICES

Our team of highly trained financial advisers share independent intelligence on industry best practices and investment options. We act as your trusted partner to help your organization make prudent decisions in all investment-related matters.



# The Meeder Difference

Meeder understands the different requirements that are necessary for corporate accounts—our expertise can streamline and simplify the investment process to help you reach your institution's or company's investment goals.

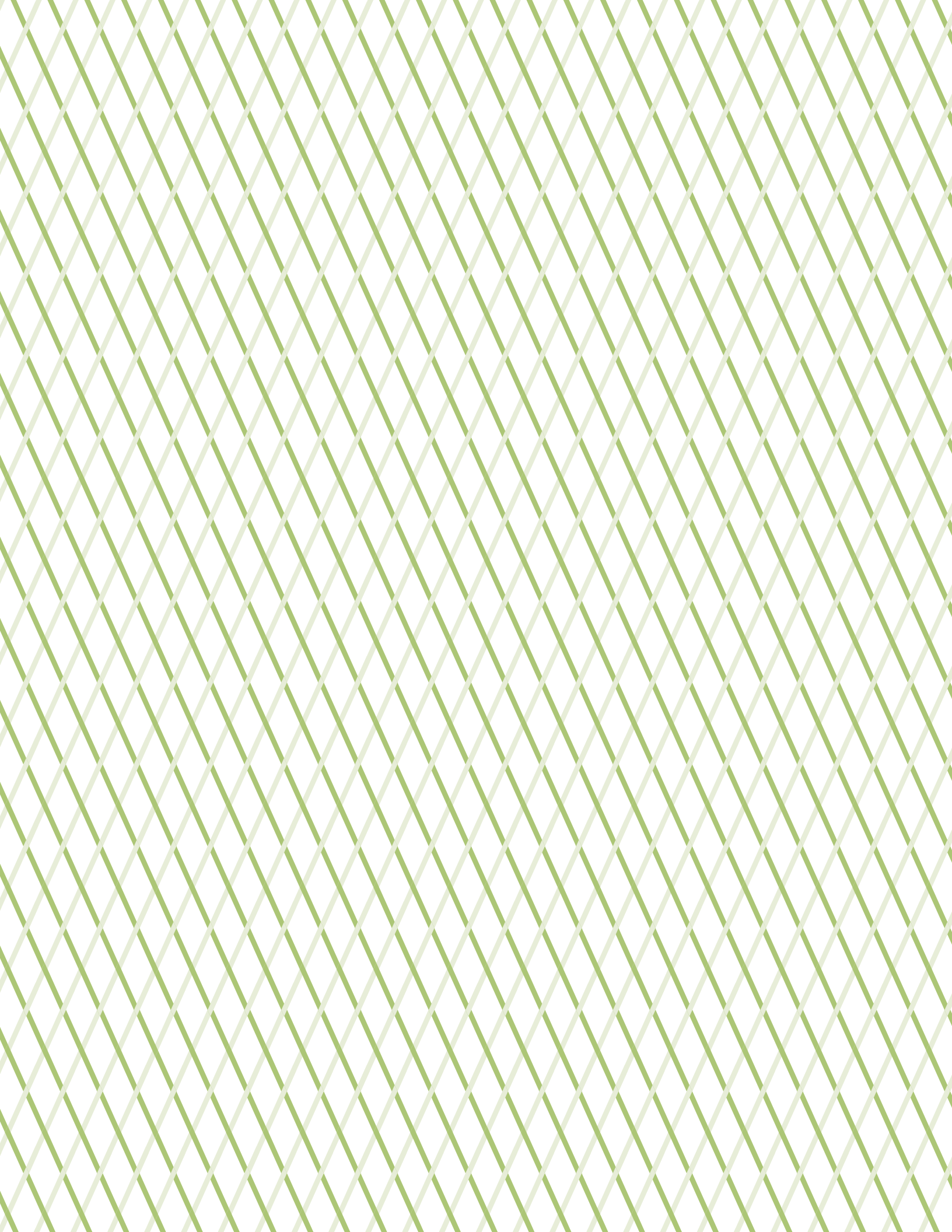


# Your Direction, Our Expertise

Meeder Investment Management provides solutions for corporate and institutional investment programs that offer the detailed expertise, scale and sophistication to uphold your organization's specialized vision and target outcomes.

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- » Firm Founded in 1974
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- » Focus on Providing Custom Solutions to Institutions
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- » More than 300 Entity Clients across the country
- 
- » Over \$45 billion of assets under advisement as of 12/31/2021
- 
- » Headquartered in Dublin, Ohio
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**M E E D E R**  
**WEALTH MANAGEMENT**

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