MEEDER

6125 Memorial Drive, P.O. Box 7177, Dublin, OH 43017
Toll Free 800.325.3539 | 614.760.2159 | Fax 614.766.6669
meederfunds.com | funds@meederinvestment.com

Meeder Investment Portfolios Transfer Request Form

INSTRUCTIONS

STEP 1: REVIEW AND COMPLETE ROLLOVER DISCLOSURE FORM

If applicable, review the Meeder Investment Portfolios Rollover Disclosure Form with your Financial Adviser and complete the Acknowledgment section.

STEP 2: COMPLETE APPLICATION

Complete the Meeder Investment Portfolios Non-Qualified Account or IRA Account Application. Retain one copy for your records.

For IRA SEP Accounts:
Complete IRS Form 5305-SEP to establish the plan, and a Meeder Investment Portfolios IRA Account Application for each participant.

STEP 3: 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 for your records.

STEP 4: MAIL ROLLOVER DISCLOSURE FORM, APPLICATION AND TRANSFER FORM

Mail completed forms to:

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

STEP 5: RECEIPT OF PURCHASE CONFIRMATION

The transfer agent for the Meeder Investment Portfolios will arrange for the transfer of your current plan's assets.

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

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

3. MEEDER INVESTMENT PORTFOLIOS ACCOUNT

Transfer to:

☐ New Meeder Investment Portfolios Account (Enclose a Meeder Investment Portfolios Application)

☐ Existing Meeder Investment Portfolio Account

Account # ________________

4. INVESTMENT SELECTION

Portfolio	**Investment**
☐ Previously selected portfolio	$ ____________

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 Investment Portfolios account for investment in accordance with my standing instructions.

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 Investment Portfolios:

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