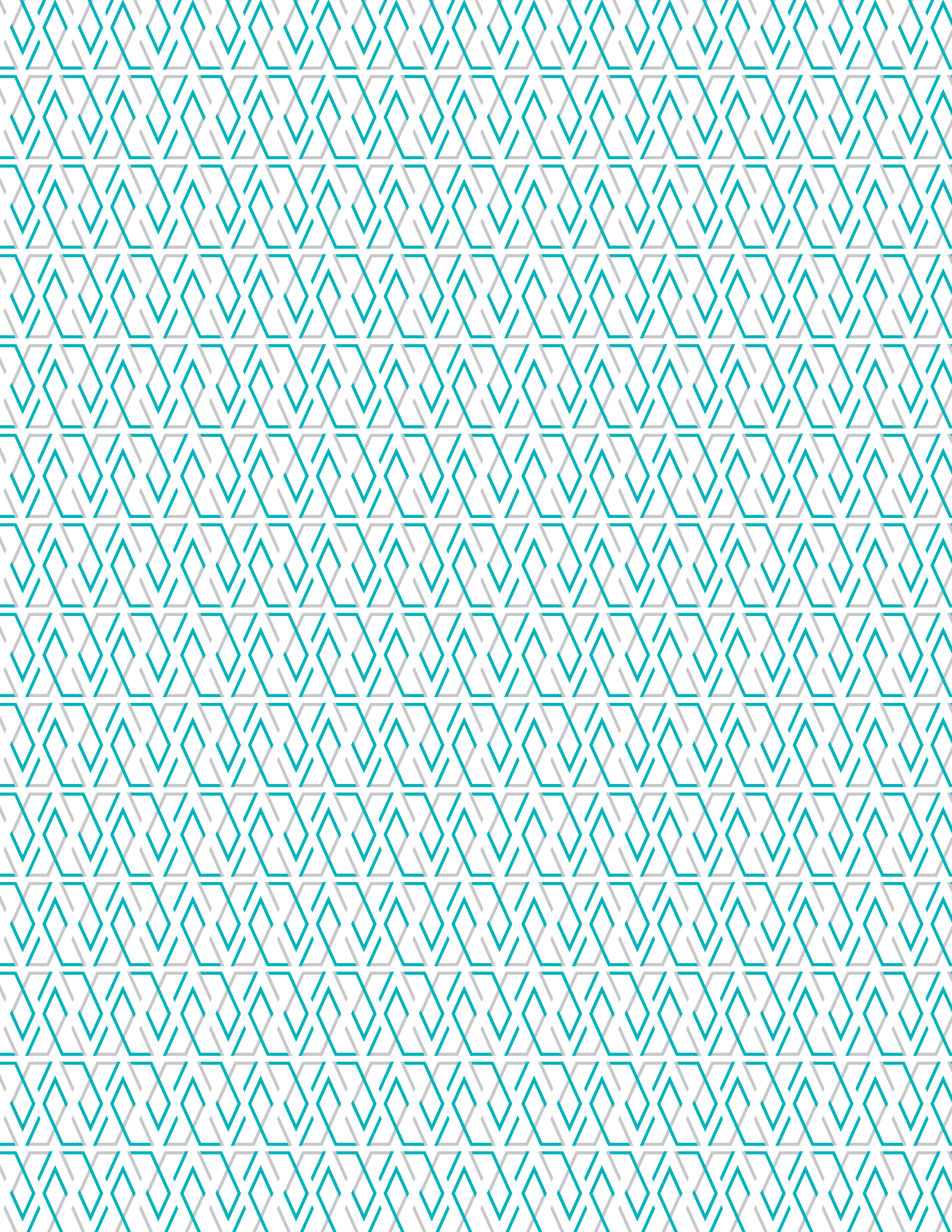




MEEDER EDGE | INVESTMENT CONSULTING

Outsourced investment management solutions customized to elevate your practice





Helping you focus on the growth of your business

You've dedicated your time, energy and resources to building a successful practice. You've had to navigate the changing industry landscape to provide your clients with the service and solutions they need to reach their goals. At Meeder, we realize that it can be challenging to balance the research and regulatory demands associated with investment management while exploring new ways to grow your business and serve your clients. Meeder Edge Investment Consulting services allow you to leverage our holistic, time-tested approach to investment management and our nearly 50 years of investment experience to work for you.



Leverage our holistic, time-tested approach

Meeder Edge Investment Consulting—your partner in providing scalable and efficient solutions to elevate your business

IN AN ENVIRONMENT OF CHANGE

Competing in today's ever-changing and challenging environment is not easy. The challenges you face as a financial advisor are increasing every day.

- » Higher levels of commoditization
- » Design and deployment barriers
- » Race to lower-cost products
- » Heavier and more intrusive regulations
- » Rising costs for research, development and personnel
- » Volatile financial markets at home and abroad

A NEW TYPE OF PARTNERSHIP

We structure our consulting solutions around you and your clients—ensuring that you are involved every step of the way. When you leverage Meeder's expertise, you benefit from a long-term partnership as your advisor team's requirements guide the way to:

- » Build scale and provide efficiency
- » Provide business development support, research and timely advice
- » Create a unique set of investment strategies and solutions
- » Deliver institutional asset management



A collaborative approach to investment management

LEVERAGING AN OUTSOURCED INVESTMENT MANAGEMENT PROCESS

Meeder offers unique ways to engage our investment management team and entire organization. We will work with your firm to design portfolios which apply a multi-discipline/multi-factor approach to portfolio management. In addition, we will combine your unique perspectives and client needs to design a set of solutions which can be customized to your specifications, while meeting the rigorous demands for improved efficiency and scalability. Portfolios are invested in a diversified portfolio of investment vehicles designed to meet a specified objective while incorporating a tactical management allocation to Meeder Funds.

UNDERSTANDING YOUR NEEDS AND OBJECTIVES

We acknowledge that each advisory firm has unique investment needs and objectives. That is why we adhere to a comprehensive five-step process that starts with Discovery.

01

Discovery



Through a comprehensive consulting and inquiry process, we work with you to understand the opportunities and challenges in your business.

02

Diagnosis



A detailed proposal is created for you, based on your firm's and your clients' unique needs. It includes a comparative analytical review of new vs. existing portfolios.

03

Design



Custom investment portfolios are developed to align with your investment clients' needs under the research and guidance of our investment team.

04

Deploy



We assist with portfolio validation and deployment through your client base, with research and information to help you manage the progress.

05

Deliver



We provide ongoing direction to ensure you remain a reliable fiduciary for your clients' assets. We deliver timely investment analytics and conduct portfolios reviews, due diligence and calls with our investment team.

The Meeder Difference

We have been providing innovative investment solutions since 1974. Our seasoned Investment Management team provides you with access to decades of experience helping advisors and their clients improve outcomes through a multi-discipline/multi-factor approach to investing.

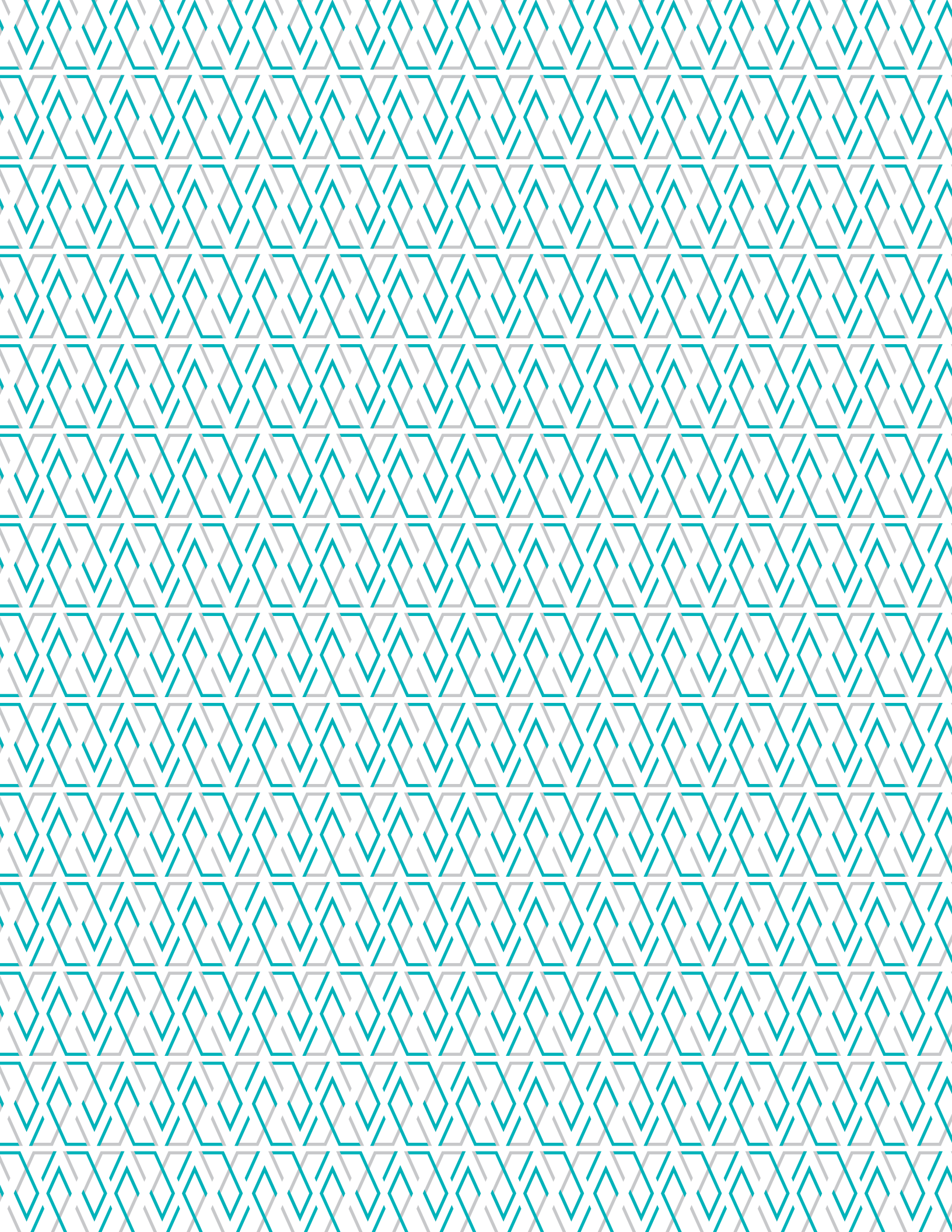
SERVICES AND SUPPORT OFFERING

- » Comprehensive current model analysis
- » Current vs. recommended model comparison
- » Questionnaire and initial consultation
- » Portfolio model recommendation and analytics
- » Investment policy statement
- » Oversight of models
- » Initial on-site meeting at Meeder home office
- » Customized marketing collateral and resources
- » Fund fact cards and portfolio analysis
- » Trade recommendations and watch list
- » Investment committee meetings and portfolio review
- » Market commentaries and views from Meeder investment team

We are here. With you. For you.

LEARN MORE. CONTACT US TODAY FOR A REVIEW.

1.866.633.3371 | CONSULTING@MEEDERINVESTMENT.COM





ABOUT MEEDER

Meeder has been helping our advisors and clients achieve their goals and objectives for nearly 50 years. We are headquartered in Columbus, OH. At Meeder, we offer a full suite of investment solutions for you and your clients throughout their investment lifecycle, from accumulation to preservation, and into distribution. We offer turnkey asset management as well as custom solutions. As part of our turnkey offerings, you can select from our lineup of tactically managed mutual funds, or a combination of our funds which we have used to create models and portfolios.

6125 Memorial Drive, Dublin, Ohio 43017 | meederinvestment.com

Meeder Advisory Consulting offers model portfolio research and consulting services to third-party investment advisers. Model portfolio recommendations are provided for illustration purposes only and Meeder Edge Investment Consulting clients are responsible for making an independent evaluation of the investment merits of the proposed portfolios and the suitability of those portfolios for any investment client. Model portfolio solutions typically incorporate a tactical management allocation to Meeder Funds, which are managed by an affiliate of the Adviser.

Services provided by Meeder Advisory Services, Inc.

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