

Tax Managed Proposal Request Instructions

MEEDER

FOR INFORMATIONAL PURPOSES ONLY. SEE IMPORTANT DISCLOSURES AT THE END OF THE PRESENTATION.

Getting Started

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- Our team will send you an email with information we need to generate the proposal.
- Reply with all the required information. Mentioned below as well.

Account Details
- Account type:
- Estimated Account Value:
- Funding Type (Cash or In-Kind):
  - If In-Kind, please also attach the client's most recent account statement(s).

Client Information
- Client Name(s):
- Email:
- Age:
- Income:
- Tax Bracket:

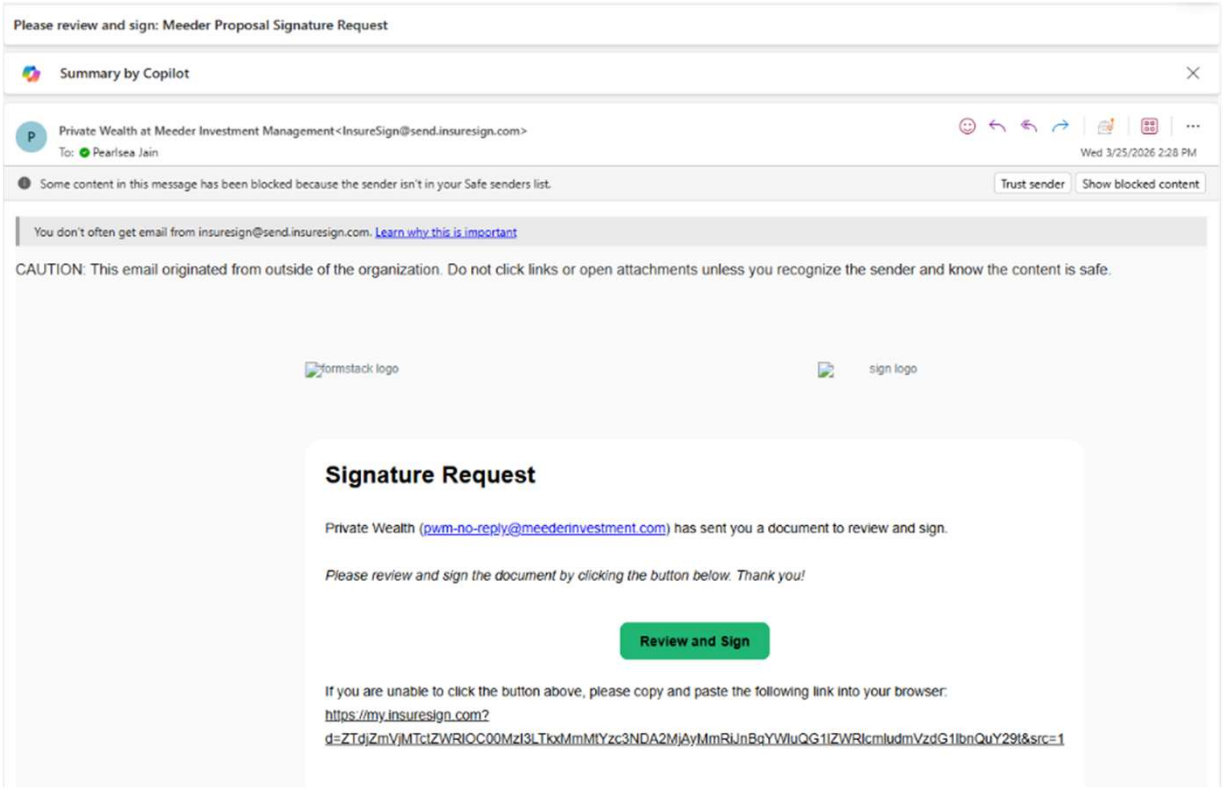
Investment Strategy
- Target Allocation (100/0, 80/20, 60/40, 40/60, 20/80):
- Equity Scope (Global or US only):
- Transition Timeline (Current to 5 years):

- Our team will then fill out the proposal request and send to you for review & signature.

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Digital Signatures

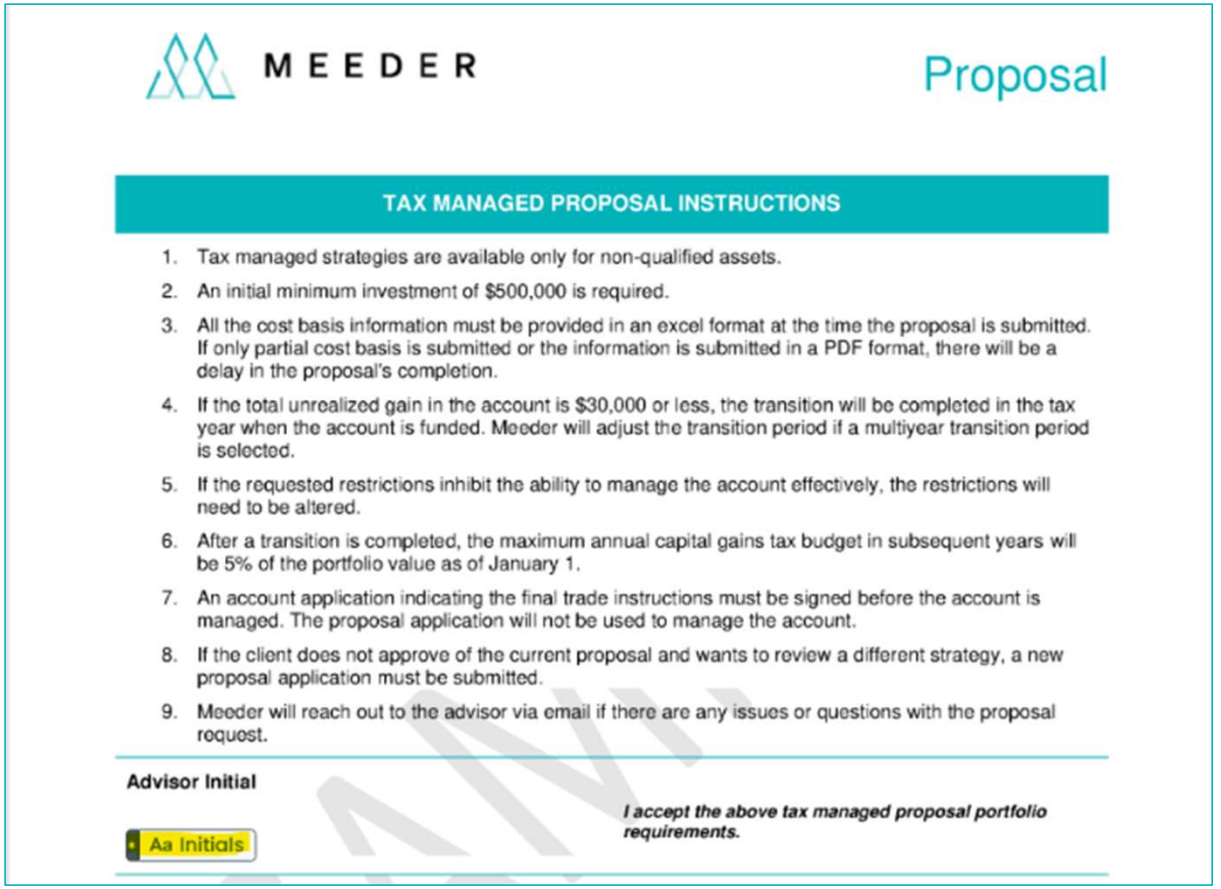
- You will receive an email from **InsureSign@sign.insuresign.com** with the subject: *Please review and sign: Meeder Proposal Signature Request.*
- Please check your spam or junk folder if this email is not in your inbox.
- *(Please see screenshot for an example of this email as well)*
- Click "Review and Sign" to open the document.



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Digital Signatures

- Please read through the Tax Managed Proposal Instructions and then click "Initials" button
- *(highlighted in sample screenshot)*

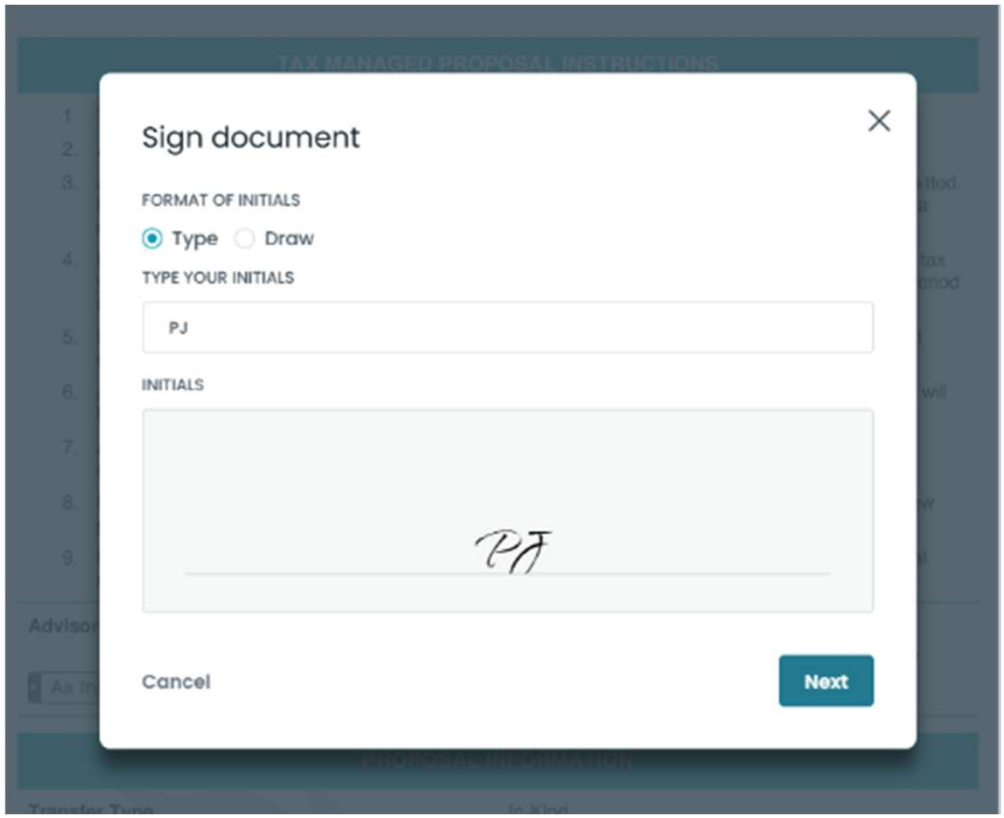


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Digital Signatures

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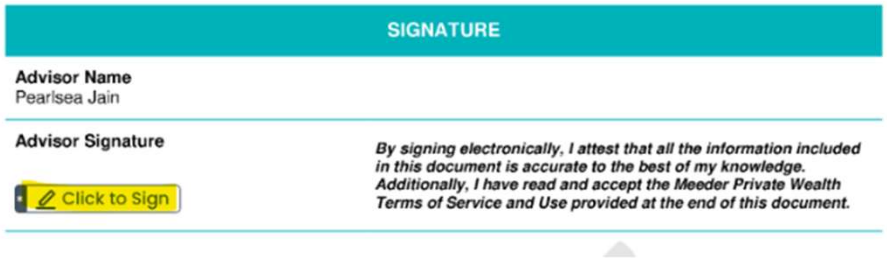
- Type your initials in the text box and click "Next" as shown



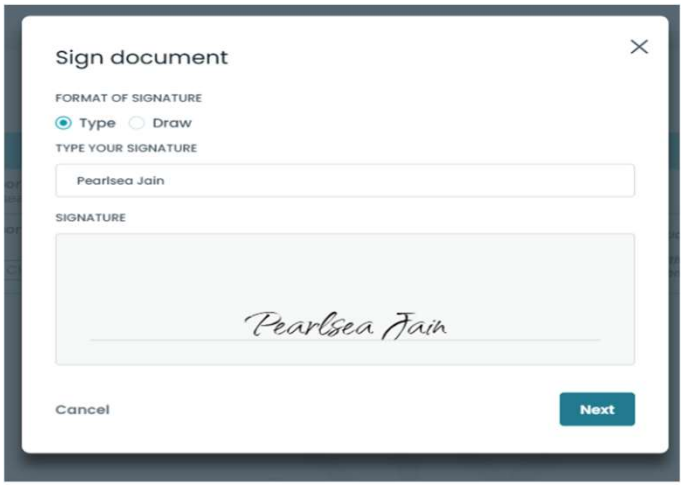
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Digital Signatures

- Scroll through the rest of the document and review all information. Once you reach the signature sections, click "Click to Sign".



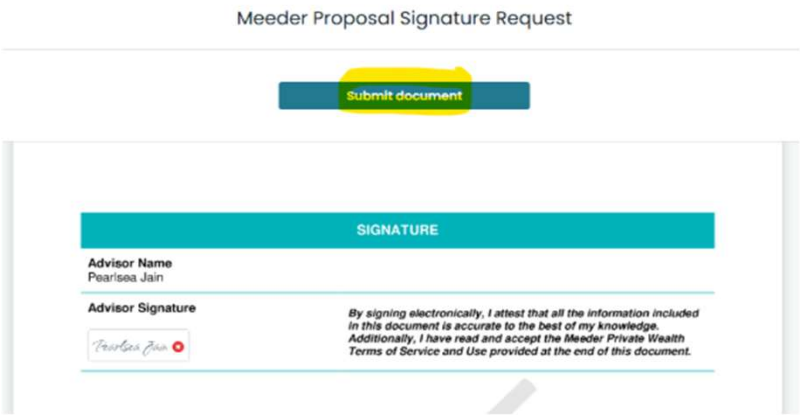
- Type your name in the text box and click "Next" as shown below.



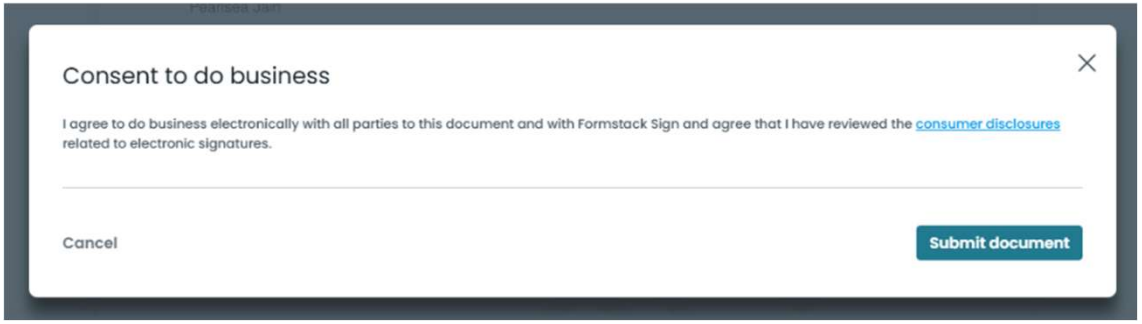
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- Click "Submit Document" at the top of the page



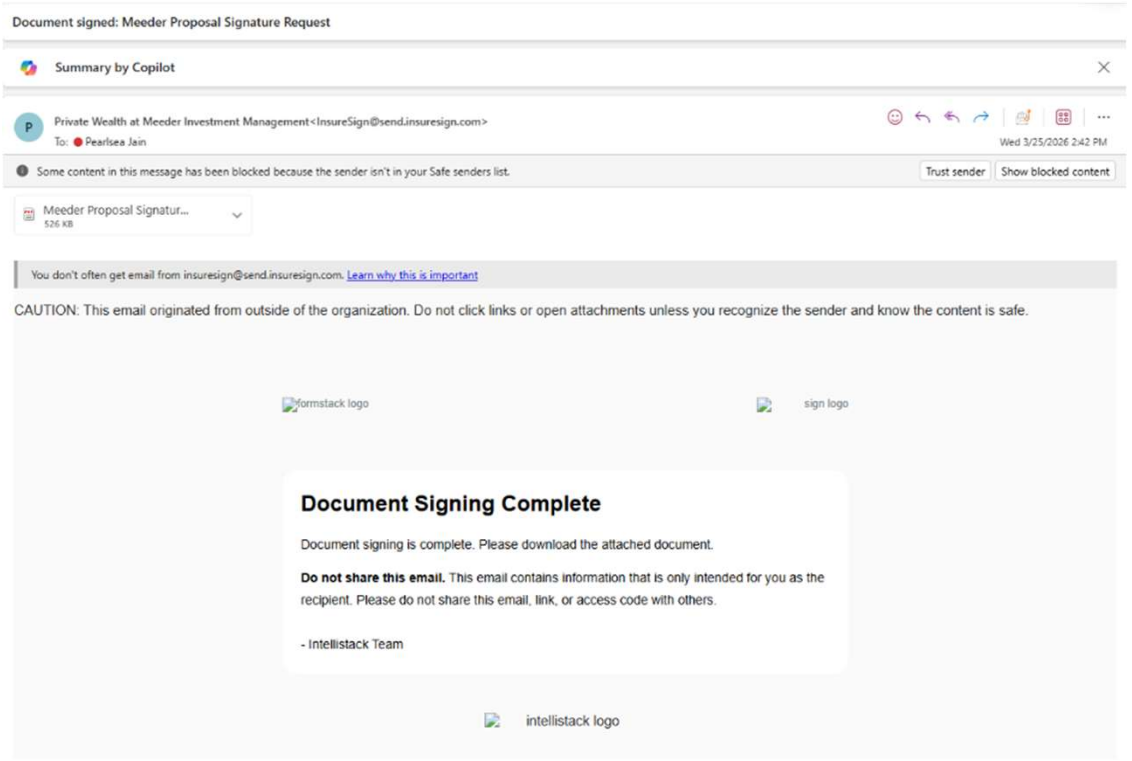
- Another prompt will pop up. Click "Submit Document" to complete the request.



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- Once completed, you will receive an email with the signed copy for your records from **InsureSign@sign.insuresign.com.**



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Next Steps

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- Our team will begin preparing your tax managed proposal and send to you for review.
- Once the proposal is ready, our team will share it along with instructions to open the account (also attached below in blue).

  If the client is ready to open the account, please complete the following steps:
  - Have the client sign the proposal acknowledgement form (attached).
    - The Proposal ID: XXX
    - Manager Name: "Meeder"
  - Please contact the Primerica concierge desk at 855-872-8656 for any Lifetime account application assistance.
  - Upload the signed proposal acknowledgement form, proposal request form, and the proposal within NetX360+ using the following codes:
    - **TMPS** (Tax Managed Portfolio Proposal Supplement Acknowledgement Form)
    - **TMPR** (Tax Managed Proposal Request)
    - **TMPF** (Tax Managed PDF Proposal)
  - All documents must be uploaded. If they are not, Primerica operations will put the account in NIGO status and contact Primerica compliance to correct the issues.
  - Once the account is open and Meeder has access, Meeder will reach out to confirm final account management instructions.

- After the client account is open and our team has received the assets along with cost basis information (if applicable), the advisor will receive a similar application to sign.
- This application will confirm the final account details, such as the risk profile and account transition.
- Once signed, you will receive a copy of this signed document via **InsureSign@sign.insuresign.com.**
- After that, Meeder will place begin placing transition trades on the account.

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Next Steps

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- **Incorrect information? Here's what to do:**
  - If you notice any incorrect or outdated information in the proposal request:
    - Please do not complete the signature request
    - Email *taxmanaged@meederinvestment* with the client name and correct details.
  - Our team will review and send an updated proposal request.

- **Questions & Support:**
  - If you have questions, need assistance, or would like to make changes, please reach out to *taxmanaged@meederinvestment.com*

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