MEEDER

MEEDER PRIVATE WEALTH

What You Can Expect With Meeder Private Wealth

The Meeder Private Wealth team serves as a boutique investment manager to high-net-worth individuals, families, financial advisors, institutions and foundations. Our team believes that each client is unique so their portfolio should be as well. Partnering with financial advisors, we construct customized portfolios based on the goals and risks of the client. We recognize the challenges that come with understanding various investment holdings and market risks, so our team provides a comprehensive and holistic analysis with recommendations for each client. With nearly 50 years as an investment management firm, our clients have found comfort in a prudent and personalized investment process.

INTRODUCTION

WHAT WE DO

» Understand client's unique goals and objectives
» Analyze all client accounts and risks
» Create a personalized proposal
» Arrange a client meeting

HOW YOU BENEFIT

» Customized Portfolio
» Personalized Investment Advice
» Access to Investment Team

INITIAL INVESTMENT

WHAT WE DO

» Finalize optimal strategy
» Implement personalized investment strategy
» Communicate initial trade

HOW YOU BENEFIT

» Seamless account transition/setup
» Personalized Risk and Tax Management
» Cash flow analysis

ONGOING

WHAT WE DO

» Assess current economic conditions
» Trade account to meet client goals
» Perform daily account monitoring
» Oversee opportunistic portfolio management

HOW YOU BENEFIT

» Quarterly market review
» Regular market updates and research
» Flexible portfolio
» Peace of mind

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Investment advisory services provided by Meeder Advisory Services, Inc.

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