Financial Advisor and Broker Dealer Change Authorization Form

MEEDER
INVESTMENT MANAGEMENT

Use this form to change the financial advisor and/or broker dealer servicing your investment. Your new financial advisor will have the information you need to complete this form. Please note: Signatures are required from your new financial advisor as well as a principal of the new broker dealer in order to authorize the change. If you are keeping the same financial advisor but changing broker dealers, you still need to complete this form. All account holders must sign this form.

Date: ___________________ Account Number: ___________________ Account Title: ___________________

Address: ____ City, State, & Zip: _____________________________________

IRS Tax Identification Number: ___________________

Please change the current financial advisor servicing my account to the new advisor as indicated below.

Current Advisor Information

Name of Advisor: _____________________________________ Name of Broker Dealer: _____________________________________

Advisor Office Address: ____ City, State, & Zip: _____________________________________

Advisor Phone Number: ________________________________ Broker Dealer Phone Number: _____________________________________

New Advisor Information

Name of Advisor: _____________________________________ Name of Broker Dealer: _____________________________________

Advisor Office Address: ____ City, State, & Zip: _____________________________________

Advisor Phone Number: ________________________________ Broker Dealer Phone Number: _____________________________________

Send completed form to:

Mail
Meeder Investment Management
6125 Memorial Drive
Dublin, OH 43017

Fax
(614) 766-6669

____________________________________ __________
Signature of Primary Account Holder Date

____________________________________ __________
Signature of Secondary Account Holder Date

____________________________________ __________
Signature of New Advisor Date

____________________________________ __________
Signature of Broker Dealer Date

____________________________________ __________
Printed Name of Broker Dealer Date