

## INSTRUCTIONS

### Step 1: Complete Application

Complete the Meeder Funds New Account or IRA Account Application. Keep one copy for your records.

For IRA SEP Accounts:

Complete IRS Form 5305-SEP to establish the plan, and a Meeder Funds IRA New Account Application for each participant.

### Step 2: Complete Transfer Form

Please complete Sections 1 through 5 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 of this form for your records.

### Step 3: Mail Application and Transfer Form

Mail completed forms to:

Meeder Funds c/o Mutual Funds Service Company, P.O. Box 7177, Dublin, OH 43017.

### Step 4: Receipt of Purchase Confirmation

The Transfer Agent for the Meeder Funds 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:

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Individual       | <input type="checkbox"/> Joint         | <input type="checkbox"/> UGMA                  |
| <input type="checkbox"/> Individual Trust | <input type="checkbox"/> Corporation   |  |
| <input type="checkbox"/> Traditional IRA  | <input type="checkbox"/> Roth IRA      | <input type="checkbox"/> Qualified Plan or TSA |
| <input type="checkbox"/> Spousal IRA      | <input type="checkbox"/> Education IRA | <input type="checkbox"/> SEP-Simplified        |
| <input type="checkbox"/> Rollover IRA     | <input type="checkbox"/> SIMPLE IRA    | <input type="checkbox"/> 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 FUNDS ACCOUNT

Transfer to: ☐ New Meeder Funds Account  
(Enclose a Meeder Funds Application)  
☐ Existing Meeder Funds Account  
Account # \_\_\_\_\_

## 4. INVESTMENT SELECTION

Portfolio	Investment
<input type="checkbox"/> Previously selected portfolio	\$ _____
Fund	Investment
<input type="checkbox"/> Balanced Fund	\$ _____
<input type="checkbox"/> Conservative Allocation Fund	\$ _____
<input type="checkbox"/> Dynamic Allocation Fund	\$ _____
<input type="checkbox"/> Global Allocation Fund	\$ _____
<input type="checkbox"/> Institutional Prime Money Market Fund	\$ _____
<input type="checkbox"/> Moderate Allocation Fund	\$ _____
<input type="checkbox"/> Muirfield Fund	\$ _____
<input type="checkbox"/> Prime Money Market Fund	\$ _____
<input type="checkbox"/> Quantex Fund	\$ _____
<input type="checkbox"/> Spectrum Fund	\$ _____
<input type="checkbox"/> Tactical Income Fund	\$ _____

## 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 Funds account immediately.

\_\_\_\_\_  
Your Signature Date

**An important note:** Your resigning trustee or custodian may require your signature to be guaranteed. Call them for requirements.

Signature Guarantee Box

## Mutual Funds Service Company will complete this Letter of Acceptance.

Instructions for delivery to the Meeder Funds.

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 4.

**Make check payable to: Meeder Funds [List Name of the Fund/Portfolio]**

**Mail to: Meeder Funds, c/o Mutual Funds Service Company, P.O. Box 7177, Dublin, OH 43017**

Also include the following information on the check:

Account No.	Authorized Signature	Date
FBO		