

Meeder Private Wealth Management

Many successful investors hold individual stocks or mutual funds with large unrealized tax gains. These positions may have come from a former employer or family member. Each investor's livelihood and financial goals become dependent on the success of these positions. The challenge for clients is how to diversify their portfolio without incurring a significant capital gain. The Meeder Private Wealth Management is a custom portfolio built to meet the needs and objectives of each client. The portfolio is designed specifically to minimize taxes and track a client-specified benchmark. The descriptions below highlight the advantages of utilizing a customized and tax-efficient solution to meet your financial goals.


SCENARIO

SOLUTION

CONCENTRATED POSITION	» A client has a portfolio of low cost-basis stocks and mutual funds. These positions have appreciated to become sizeable positions, and they are now key risk and return drivers of the portfolio. The client would like a diversified portfolio, but this would trigger substantial capital gains.	» Working closely with the advisor and client, our team will provide the most advantageous strategy for unwinding concentrated positions. We will bring over the existing holdings "in-kind" to minimize the tax implications. We will manage around the current positions while seeking opportunities to maximize tax efficiency.
CUSTOMIZATION	» A sophisticated client would like to hold an individual stock portfolio but exclude specific stocks and sectors.	» Meeder can very easily exclude specific stocks or sectors to create a customized index. Our Private Wealth team implements a variety of screening capabilities without sacrificing the integrity of the asset allocation or client's financial planning goals.
TACTICAL PORTFOLIO MANAGEMENT	» A high net worth client would like active management in order to take advantage of opportunities in the market.	» Meeder utilizes both proprietary and institutional research in order to identify opportunities within the market and dynamically take advantage of those opportunities in the client's portfolio.
TAX EFFICIENCY	» A client would like greater emphasis on their tax cost. They would like a diversified portfolio across asset classes with greater focus on minimizing their tax liability.	» Our Private Wealth Solution is built upon Meeder's track record managing portfolios since 1974. Our portfolios are constructed with a focus on maximizing after tax return through tax loss harvesting and gain deferral.

LEARN MORE For more information, please contact **614.760.2144** or PrivateWealth@meederinvestment.com

Meeder Private Wealth Management may not be suitable for all investors. Investing in securities involves inherent risks, including the risk that you can lose the value of your investment. Past performance does not guarantee future results and any expected returns or hypothetical projections may not reflect actual performance. Meeder does not provide tax advice and does not represent that any portfolio design will result in a particular tax consequence. Prospective investors should consult with their personal tax advisors regarding their specific situation and circumstances. Meeder assumes no responsibility for the tax consequences of any transaction or portfolio.

Advisory services provided by Meeder Asset Management, Inc., registered investment advisor.