



**MEEDER**  
INVESTMENT MANAGEMENT

MEEDER PRIVATE WEALTH MANAGEMENT

Customized solutions tailored  
to each client's unique needs



# Meeder Private Wealth Management— the optimal solution for investors

At Meeder, we have been helping investors improve their investment outcomes for more than 46 years. Meeder Private Wealth Management is a customized managed account that is engineered for each investor's personal goals with a focus on risk management, investment selection, and tax efficiency.



## CUSTOMIZATION

- » No “one size fits all” approach
- » Portfolio built to the client goals and objectives
- » Dedicated investment team



## TAX EFFICIENCY

- » Implement tax loss harvesting and gain deferral
- » Continuous and thoughtful tax management
- » Maximize after tax wealth by managing short- and long-term gains



## RISK MANAGEMENT

- » Manage around concentrated positions
- » Hold or exclude specific sectors, industries, or stocks
- » Align portfolio with personalized risk profile



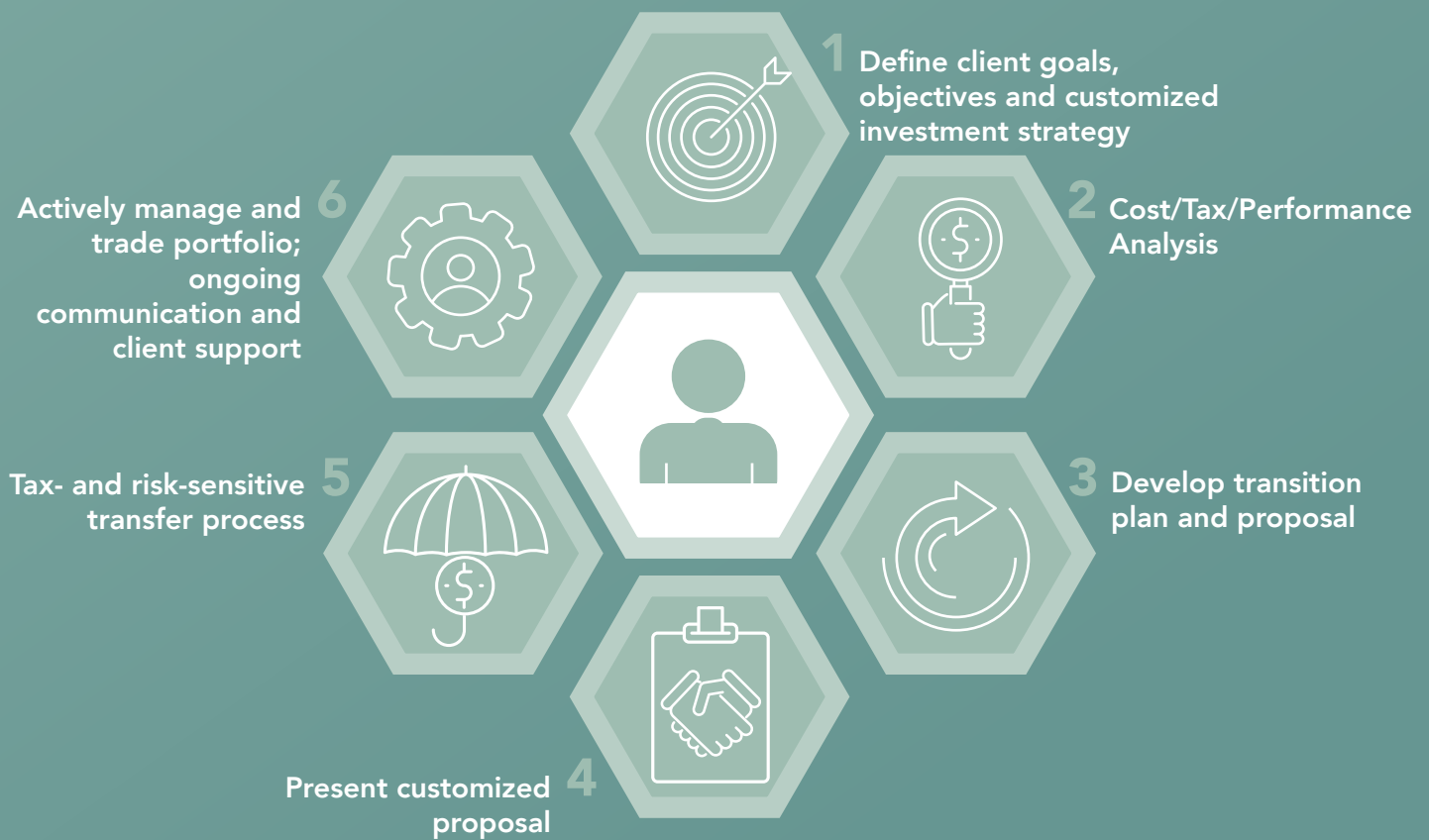
## INVESTMENT MANAGEMENT

- » No proprietary investments or Meeder Funds
- » Deep and experienced investment team
- » Transparent and unbiased approach



# It's all about customization

We acknowledge that each investor has unique investment needs and objectives. That is why we put customization at the forefront of our process, working closely with you every step of the way.





## The Meeder Difference

Our seasoned investment team builds portfolios around each investor's unique investment goals and objectives. With a thorough understanding of the investor, we tailor the portfolio to their market and risk parameters. Within the custom equity allocation, investors have the ability to exclude certain stocks or sectors, as well as manage around concentrated positions. The customized portfolio ensures the investor has a solution truly built for them.

### **WITH MEEDER, WE BUILD CUSTOM TAX TRANSITION PORTFOLIOS TO ADDRESS A RANGE OF INVESTMENT NEEDS.**

- » Custom tax management
- » Ability to fund portfolio with existing securities
- » Manage around existing securities
- » Include/Exclude specific securities
- » Manage to a customized benchmark
- » Transparency
- » Direct ownership of equity

**Meeder Private Wealth Management provides investors with the benefits of both customization and access to non-proprietary investment offerings in a single portfolio.**

**Contact us today—1.866.633.3371 | [wealthmanagement@meederinvestment.com](mailto:wealthmanagement@meederinvestment.com)**



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