Meeder Private Wealth Management

Many successful investors hold individual stocks or mutual funds with large unrealized tax gains. The challenge for investors is diverisifying their their portfolio without incurring significant capital gains. The Meeder Private Wealth solutions are custom portfolios built to meet the needs and objectives of each client. The portfolios are designed specifically to minimize taxes and track a investor-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	» An investor 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 investor would like a diversified portfolio, but this would trigger substantial capital gains.	» Working closely with the investor, 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	» An investor 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 team implements a variety of screening capabilities without sacrificing the integrity of the asset allocation or client's financial planning goals.
INCOME WITHDRAWAL	» An investor's objective is to have their portfolio provide income but still have the opportunity for growth.	» Meeder provides investors the flexibility to participate in the long-term growth of the market while also providing the desired level of income within a given risk profile by designing the portfolio's equity sleeve around high-quality dividend-paying stocks.
TAX EFFICIENCY	» An investor would like a diversified portfolio across asset classes with greater focus on minimizing their tax liability.	» Our Private Wealth Management solutions are 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 **866.633.3371** or **privatewealth@meederinvestment.com**

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Investment advisory services offered by Meeder Advisory Services, Inc.

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