

MEEDER WEALTH MANAGEMENT

Personalized Solutions for Your Life's Journey

Whether you are new to investing, or a savvy investor holding multiple accounts, you are seeking to build your wealth while managing risks. But sometimes the possibility of market volatility or triggering capital gains taxes may deter you from building a better, more diversified portfolio. Meeder Private Wealth portfolios mitigate these issues and help optimize outcomes using Separately Managed Accounts (SMAs) for both qualified and non-qualified investing.

Unlike typical ETF and mutual fund investing, Meeder Separately Managed Accounts offer comprehensive customization, risk management and tax-advantaged benefits.

MEEDER PRIVATE WEALTH PORTFOLIO ADVANTAGES		SEPARATELY MANAGED ACCOUNTS	INDEX ETF / MUTUAL FUND
Customization & Risk Management	» Portfolios personalized for individuals and families	✓	X
	» Direct ownership of individual stocks	✓	X
	» Seamless transfer of existing positions in-kind	✓	X
	» Portfolio management around concentrated positions	✓	X
	» Choice among specific stocks, sectors and industries	✓	X
	» Flexible strategy that adapts to changing risks	✓	X
Tax Management	» Customized tax budget	✓	X
	» Control of capital gains	✓	X
	» Ability to distribute capital losses	✓	X
	» Dividend reinvestment	Paid as cash	✓
	» Increase after-tax returns through tax-minimization strategies	✓	X

Put our nearly 50 years of investment management success to work for you today.

CONTACT US TODAY TO SPEAK WITH AN ADVISER

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