

# Meeder Investment Portfolios Investor Profile Questionnaire and Portfolio Selection Form

This questionnaire is designed to help you determine which portfolio is most appropriate for you by measuring your risk tolerance, time horizon, and investment objectives. It does not consider your specific financial or tax situation and is not intended to be investment advice. For additional guidance on which portfolio may be right for you, please speak with your Financial Adviser.

1. I expect to start withdrawing money from my account in:

- 0–5 years (1 point)
- 5–10 years (3 points)
- 10–20 years (5 points)
- More than 20 years (7 points)

2. What is your primary investment goal?

- Avoid loss of initial investment value (1 point)
- Stable returns on investment (3 points)
- Obtain modest long-term growth (5 points)
- Maximize long-term growth (7 points)

3. If the stock market gained 20% in any given year, I would expect a minimum return of:

- 5–10% (1 point)
- 10–15% (3 points)
- 15–20% (5 points)
- Equal to or greater than the return of the stock market (7 points)

4. Which statement describes most accurately your tolerance for risk?

- I am not willing to accept any loss in portfolio value in order to achieve my investment goals (1 point)
- I can accept small declines in value in order to achieve my investment goals (3 points)
- I can accept moderate declines in value in order to achieve my investment goals (5 points)
- I am willing to accept substantial declines in portfolio value in order to achieve my investment goals (7 points)

5. From September 2008 through November 2008, stocks lost over 30%. Based on my long-term investment strategy, during this time period, it would have been acceptable for me to have lost:

- 0 to 10% (1 point)
- 10 to 20% (3 points)
- 20 to 30% (5 points)
- More than 30% (7 points)

\_\_\_\_\_ **TOTAL SCORE. Please select the portfolio that corresponds with your total score on page 2.**

## MEEDER PORTFOLIOS

5–10 points: Conservative Portfolio (30% Defensive Growth / 70% Defensive Fixed Income)

11–15 points: Moderate Conservative Portfolio (50% Defensive Growth / 50% Defensive Fixed Income)

16–20 points: Balanced Portfolio (70% Defensive Growth / 30% Defensive Fixed Income)

21–27 points: Moderate Growth Portfolio (100% Defensive Growth)

28–32 points: Growth Portfolio (100% Growth)

33–35 points: Aggressive Growth Portfolio (100% Aggressive Growth)

**PORTFOLIO SELECTION** – Only one portfolio strategy may be selected per account. Based on the questionnaire score and my discussions with my Financial Adviser, I select the portfolio below:

Conservative (30% Defensive Growth / 70% Defensive Fixed Income)

Moderate Conservative (50% Defensive Growth / 50% Defensive Fixed Income)

Balanced (70% Defensive Growth / 30% Defensive Fixed Income)

Moderate Growth (100% Defensive Growth)

Growth (100% Growth)

Aggressive Growth (100% Aggressive Growth)

### CLIENT ACKNOWLEDGEMENT

Client acknowledges and confirms that, after reviewing the available portfolios with the undersigned Financial Adviser, Client has selected a portfolio consistent with Client's investment objectives, time horizon and risk tolerance. Client has received and reviewed the Fact Sheet, Prospectus, and ADV Brochure for the program and authorizes Meeder to allocate funds deposited to the account in the selected portfolio and to manage the account in accordance with the program set forth in the Asset Allocation Agreement.

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NAME

DATE

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SIGNATURE

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ACCOUNT NUMBER

SOCIAL SECURITY NUMBER (LAST 4 ONLY)

### FINANCIAL ADVISER ACKNOWLEDGEMENT

Financial Adviser acknowledges and confirms that Financial Adviser has provided Client with sufficient information for Client to understand the program, fees and available portfolios. After reviewing the program information with the Client and evaluating Client's investment needs, time horizon and risk tolerance, Financial Adviser believes the portfolio selected is appropriate for Client. Financial Adviser further acknowledges that Client has been provided with all necessary documents and disclosures related to the program, including the portfolio fact sheet, funds prospectus, ADV disclosure brochure and privacy policy.

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NAME

DATE

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SIGNATURE