



# Meeder Retirement Portfolios Portfolio Change Request Form

Account Name: \_\_\_\_\_ Plan Number: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**Please check the box that corresponds to your desired New Model Portfolio.**

**Investment Strategy Portfolios**

- Conservative
- Moderate Conservative
- Balanced Income
- Balanced
- Balanced Growth
- Moderate Growth
- Growth
- Aggressive Growth

**OR**

**Age-Based Portfolios**

Birth Year: \_\_\_\_\_

- You will be placed into the Age-Based Portfolio that coincides with your current age. As you move closer to the average retirement age of 65, we will automatically move your assets to the next most conservative portfolio.

**By signing below, I acknowledge that I understand the investment strategies and risk profile of the new model portfolio I am choosing, or I have discussed this change with the financial representative for my account.**

**This change will be reflected within (10) business days of receipt by the investment manager.**

**This signed form may be faxed, mailed or scanned/mailed to the investment manager.**

- For FAX delivery: 614.791.2572
- For scanned/email delivery: [clientservices@meederinvestment.com](mailto:clientservices@meederinvestment.com)
- For mail delivery: Meeder Investment Management, 6125 Memorial Drive, Dublin, OH 43017 - Attention: Client Services

\_\_\_\_\_  
**Shareholder Signature (Required)**

\_\_\_\_\_  
**Date (Required)**

\_\_\_\_\_  
**Name (Please Print)**

\_\_\_\_\_  
**Email Address**

**FOR QUESTIONS PLEASE CALL RETIREMENT PLAN SERVICES AT 888-865-6709**