

Managed Accounts for Participants Account Portfolio Change Request

ipant Name:	Plan Name:
Security Number:	Date:
I wish to change my Model Investment Portfolio.	
(1) Please check the box that corresponds to your Curre	vent Model Portfolio
(2) Please check the box that corresponds to your desired	
(1) Current Model Portfolio	(2) New Model Portfolio
☐ Defensive Income	☐ Defensive Income
☐ Defensive Balanced	☐ Defensive Balanced
☐ Defensive Moderate Growth	☐ Defensive Moderate Growth
☐ Defensive Growth	☐ Defensive Growth
☐ Balanced Income	☐ Balanced Income
☐ Balanced Growth	☐ Balanced Growth
☐ Growth*	☐ Growth*
☐ Aggressive Growth*	☐ Aggressive Growth*
☐ Target Date Retirement Portfolio	☐ Target Date Retirement Portfolio
	(Please check the correct box below)
*Remains fully inve	ested in the equity market at all times.
I wish to change my Target Date Retirement Ports Please contact the financial representative on your retire	
	rement plan for guidance on changing your model investment portfolio in tent Target Date Retirement Portfolio. Ted New Target Date Retirement Portfolio.
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years	rement plan for guidance on changing your model investment portfolio in tent Target Date Retirement Portfolio. Ted New Target Date Retirement Portfolio.
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years	rement plan for guidance on changing your model investment portfolio is rent Target Date Retirement Portfolio. The transport of the Portfolio
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years (1) Current Target Date Retirement Portfolio	rement plan for guidance on changing your model investment portfolio is rent Target Date Retirement Portfolio. The transport of the Portfolio of the Target Date Retirement Portfolio. The transport of the Target Date Retirement Portfolio of the Target Date Retirement Portfolio The Target Date Retirement Portfolio of the Ta
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years (1) Current Target Date Retirement Portfolio	rement plan for guidance on changing your model investment portfolio is rent Target Date Retirement Portfolio. Target Date Retirement Portfolio. Until retirement is required to process this form. (2) New Target Date Retirement Portfolio Please indicate which portfolio you would like to be in AND the number of years until your planned retirement. □ TDRP 1: 5 years and less
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years (1) Current Target Date Retirement Portfolio □ TDRP 1: 5 years and less □ TDRP 2: 6-10 years	rement plan for guidance on changing your model investment portfolio is rent Target Date Retirement Portfolio. Target Date Retirement Portfolio. Until retirement is required to process this form. (2) New Target Date Retirement Portfolio Please indicate which portfolio you would like to be in AND the number of years until your planned retirement. TDRP 1: 5 years and less
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years (1) Current Target Date Retirement Portfolio □ TDRP 1: 5 years and less □ TDRP 2: 6-10 years □ TDRP 3: 11-15 years	rement plan for guidance on changing your model investment portfolio is rent Target Date Retirement Portfolio. The transport Date Retirement Portfolio. The transport Date Retirement Portfolio. The transport Date Retirement Portfolio Please indicate which portfolio you would like to be in AND the number of years until your planned retirement. The property of the transport of the transport of the portfolio you would like to be in Torder to the portfolio y
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years (1) Current Target Date Retirement Portfolio DRP 1: 5 years and less DRP 2: 6-10 years DRP 3: 11-15 years DRP 4: 16-20 years	rement plan for guidance on changing your model investment portfolio is rent Target Date Retirement Portfolio. Target Date Retirement Portfolio. Until retirement is required to process this form. (2) New Target Date Retirement Portfolio Please indicate which portfolio you would like to be in AND the number of years until your planned retirement. TDRP 1: 5 years and less TDRP 2: 6-10 years TDRP 3: 11-15 years TDRP 4: 16-20 years
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years (1) Current Target Date Retirement Portfolio □ TDRP 1: 5 years and less □ TDRP 2: 6-10 years □ TDRP 3: 11-15 years	rement plan for guidance on changing your model investment portfolio is red. Target Date Retirement Portfolio. The transport Date Retirement Portfolio. The transport Date Retirement Portfolio. The transport Date Retirement Portfolio Please indicate which portfolio you would like to be in AND the number of years until your planned retirement. The property of the transport of the transport of the portfolio you would like to be in AND the number of years until your planned retirement. The property of the transport of the portfolio you would like to be in AND the number of years until your planned retirement. The property of the portfolio you would like to be in AND the number of years and less The property of the proper
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years (1) Current Target Date Retirement Portfolio DRP 1: 5 years and less DRP 2: 6-10 years DRP 3: 11-15 years DRP 4: 16-20 years	rement plan for guidance on changing your model investment portfolio if the tent Target Date Retirement Portfolio. Target Date Retirement Portfolio. Until retirement is required to process this form. (2) New Target Date Retirement Portfolio Please indicate which portfolio you would like to be in AND the number of years until your planned retirement. TDRP 1: 5 years and less TDRP 2: 6-10 years TDRP 3: 11-15 years TDRP 4: 16-20 years
Please contact the financial representative on your retire your time horizon or financial circumstances change. (1) Please check the box that corresponds to your Curre (2) Please check the box that corresponds to your desire **PLEASE NOTE: The specific number of years (1) Current Target Date Retirement Portfolio DRP 1: 5 years and less DRP 2: 6-10 years DRP 3: 11-15 years DRP 4: 16-20 years DRP 5: 21 years and greater	rement plan for guidance on changing your model investment portfolio in the transport of the Retirement Portfolio. Target Date Retirement Portfolio. Target Date Retirement Portfolio. Until retirement is required to process this form. (2) New Target Date Retirement Portfolio Please indicate which portfolio you would like to be in AND the number of years until your planned retirement. TDRP 1: 5 years and less TDRP 2: 6-10 years TDRP 3: 11-15 years TDRP 4: 16-20 years TDRP 5: 21 years and greater I will be retiring in years.** stment strategies and risk profile of the new model portfolio I am

Fax completed form to 614-791-2572 or mail to Meeder Advisory Services, 6125 Memorial Drive Dublin, OH 43017