



Choose ONLY ONE Option below.

Option 1: TARGET DATE RETIREMENT PORTFOLIOS

Target Date Retirement Portfolios are managed based upon your current age and how many years until you expect to retire.

- Yes, I want to be invested in a Target Date Retirement Portfolio that is managed based upon when I plan to retire. I plan to retire in ____ years.
 *If you checked yes, do not fill out the rest of the options. Simply sign the enclosed Agreement and return this application and Agreement to your human resources or financial representative.*
- No, I do not want to be invested in a Target Date Retirement Portfolio.
 *Please continue to Option 2.*

Option 2: RISK BASED PORTFOLIOS:

To select Option 2, you must complete the Investor Profile Questionnaire below.

Based upon the results of your Investor Profile Questionnaire, your account will be invested in the model portfolio that is most consistent with your specific investment objectives and risk tolerance.

By choosing Option 2 and signing the Agreement you are acknowledging that your answers in the Investor Profile Questionnaire are true and complete.

Write Your
Scores
Here:

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

- | | | | | | |
|--------------------------|--|--|---|--|--|
| <input type="checkbox"/> | <input type="checkbox"/> 3 years or less
<i>1 point</i> | <input type="checkbox"/> 4 to 7 years
<i>2 points</i> | <input type="checkbox"/> 8 to 12 years
<i>3 points</i> | <input type="checkbox"/> 13 to 20 years
<i>4 points</i> | <input type="checkbox"/> more than 20 years
<i>5 points</i> |
|--------------------------|--|--|---|--|--|

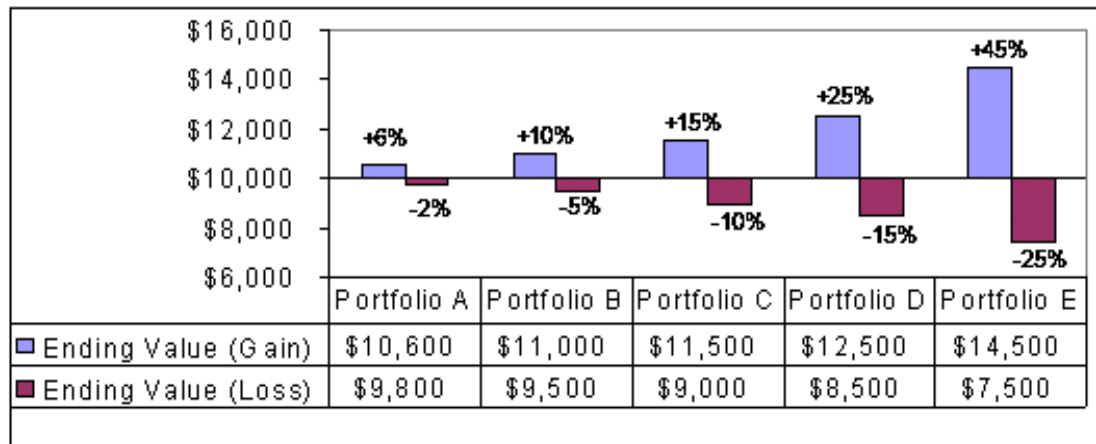
Question 2: If the stock market gained 20% in any given year, I would expect a minimum return of:

- | | | | | | |
|--------------------------|---|--|--|--|---|
| <input type="checkbox"/> | <input type="checkbox"/> Less than 5%
<i>1 point</i> | <input type="checkbox"/> 5% to 9%
<i>3 points</i> | <input type="checkbox"/> 10% to 14%
<i>5 points</i> | <input type="checkbox"/> 15% to 19%
<i>7 points</i> | <input type="checkbox"/> Equal to or greater than the return of the stock market.
<i>10 points</i> |
|--------------------------|---|--|--|--|---|

Question 3: Which statement best reflects your feelings when there are declines in the value of your account:

- | | |
|---|---|
| <input type="checkbox"/> I can tolerate only modest declines of 1% to 5% in the value of my account.
<i>3 points</i> | <input type="checkbox"/> I can tolerate a loss of 5% to 10% to achieve potentially favorable long-term results.
<i>5 points</i> |
| <input type="checkbox"/> I can tolerate losses of 10% to 20% to achieve potentially favorable long-term results.
<i>7 points</i> | <input type="checkbox"/> I can tolerate losses greater than 20% to potentially experience significant gains over the long-term.
<i>10 points</i> |

Question 4: The chart below shows the greatest hypothetical 1-year gain and hypothetical 1-year loss assuming you had a \$10,000 account balance.



Which of the portfolios shown in the chart above would be appropriate for you?

- | | | | | |
|--|---|---|---|--|
| <input type="checkbox"/> Portfolio A
<i>1 point</i> | <input type="checkbox"/> Portfolio B
<i>3 points</i> | <input type="checkbox"/> Portfolio C
<i>5 points</i> | <input type="checkbox"/> Portfolio D
<i>7 points</i> | <input type="checkbox"/> Portfolio E
<i>10 points</i> |
|--|---|---|---|--|

Total: Add the scores from questions 1–4 and write your total score in the box to the left.

Your Total Score will correspond to one of the six portfolios listed on the next page.

Please mark the box of the portfolio that corresponds with your Total Score from the previous page.

<input type="checkbox"/> 6-9 points Defensive Income ■ Defensive Equity 30% ■ Defensive Fixed Income 70%	<input type="checkbox"/> 10-13 points Defensive Balanced ■ Defensive Equity 50% ■ Defensive Fixed Income 50%
<input type="checkbox"/> 14-18 points Defensive Moderate Growth ■ Defensive Equity 70% ■ Defensive Fixed Income 30%	<input type="checkbox"/> 19-25 points Defensive Growth ■ Defensive Equity 100%
<input type="checkbox"/> 26-31 points Growth ■ Fully-Invested Equity 100%	<input type="checkbox"/> 32-35 points Aggressive Growth ■ Fully-Invested Equity 100%



If you agree with your point total and checked a Portfolio in the box above, DO NOT fill out Option 1 or Option 3.



Please continue to Option 3 if you disagree with your score and corresponding Portfolio above.

Option 3: OVERRIDE

If you check one of the boxes below, Meeder Advisory Services will **AUTOMATICALLY** override Options 1 and 2 and allocate the assets in your account and future contributions to the Portfolio you have chosen below.

- | | |
|---|--|
| <input type="checkbox"/> Defensive Income | <input type="checkbox"/> Defensive Balanced |
| <input type="checkbox"/> Defensive Moderate Growth | <input type="checkbox"/> Defensive Growth |
| <input type="checkbox"/> Balanced Income | <input type="checkbox"/> Balanced Growth |
| <input type="checkbox"/> Growth | <input type="checkbox"/> Aggressive Growth |

NEXT STEP: Please review and sign the Investment Advisory Agreement.

24. Redemption Fees and Short Term Trading

Participant acknowledges that Participant Accounts may be monitored for excessive and other forms of abusive trading and may be subject to administrative procedures and/or restrictions developed by service providers or implemented by service providers at the direction of investment option providers. These policies may take the form of redemption fees and/or purchase block or other trade restrictions. For further information on redemption fees or trade restrictions, including whether one will be applicable to an individual investment option for the Plan, please consult the individual fund prospectus or other investment option disclosure material.

25. Termination

The term of this Agreement will begin on the date that is accepted by Adviser as evidenced by the date of the signature of an authorized Adviser Representative and will continue until either the Participant or Adviser receives from the other written notice that the other elects to terminate this Agreement. The termination will be effective ten business days from receipt of the proper written termination notice ("Termination Date"). Client has the right to terminate this Agreement without penalty within five business days after signing this Agreement by providing written notice to the Adviser. The parameters of providing proper written notice are described in Section 20. Termination of this Agreement will not affect the validity of any action previously taken by Adviser under this Agreement, liabilities or obligations of the parties from transactions initiated before termination of this Agreement. Upon Adviser's receipt of the termination notice, Adviser will have no obligation to recommend or take any action with regard to the securities, cash or other investments in the Account; and therefore have no liability for investment losses incurred after termination of the Adviser, with the exception of gross negligence or willful malfeasance by Adviser. The Adviser is authorized to complete transactions in progress but shall not begin any new transactions. As of the Termination Date, it is solely the Participant's responsibility to monitor the account. Otherwise all terms and conditions as stated regarding the Account are binding. Adviser is entitled to any outstanding Investment Advisory Fees due as of the Termination Date.

26. Automatic Asset Rebalancing

Plan Participant acknowledges that while managed account services are being provided, he or she will no longer be able to utilize any Automatic Asset Rebalancing (AAR) feature available under the Plan.

27. Acknowledgment of Receipt

By Client's signature below, Client: (a) Agrees to the terms of this Agreement, (b) Acknowledges that the answers in the Investor Risk Tolerance Profile are true and complete, (c) Acknowledges receipt of the Solicitor's Disclosure Statement pursuant to Rule 206(4)-3 under the Investment Advisers Act of 1940 describing the arrangement between the Adviser and the Solicitor (See page 11), (d) Understands that upon execution of this Agreement by Adviser this Agreement is made and entered into on the date executed and the Account is accepted for management, and (e) Understands that he or she will be sent the Investment Policy Statement within a reasonable amount of time after said execution and (f) Acknowledges receipt of the Adviser's Privacy Policy.

Signature of Client

Date

Signature of Adviser

Date

SOLICITOR'S DISCLOSURE STATEMENT PURSUANT TO RULE 206(4)-3 UNDER THE INVESTMENT ADVISERS ACT OF 1940

The Disclosure is required to be provided to the undersigned client(s) ("Client") to inform Client of the participation of the investment advisers listed below who will be compensated for referring Client to Meeder Advisory Services, Inc. ("Meeder"), the investment adviser under the Investment Advisory Agreement (the "Agreement") entered into between Client and Meeder to which this Disclosure is attached. The Adviser providing such solicitation services is:

Advisory Firm: **AIG Financial Advisors**

Broker/Dealer: **AIG Financial Advisors**

- 1) Meeder has agreed to pay Solicitor solicitation fees, the terms of which are set forth in the paragraphs below.
- 2) Meeder will pay quarterly to Solicitor a minimum solicitation fee of an amount equal to **0.25 % (25 basis points)** per annum in consideration for assisting the Client in determining the suitability of Meeder's services for Client.
- 3) Meeder will charge Client a fee for Meeder's investment advisory services, as provided in the Agreement. Client will not be charged any fee in excess of Meeder's advisory fee for the services of Solicitor.

By signing on page 11, you are acknowledging receipt of the Disclosure and Agreement with the terms of this Solicitor's Disclosure Statement.