MEEDER WEALTH MANAGEMENT

Meeder Wealth Management & Summit

We're better together

MEEDER
WEALTH MANAGEMENT

Investment advisory and financial planning services offered through Summit Financial, LLC ("Summit"), a SEC Registered Investment Adviser, doing business as Meeder Wealth Management ("Meeder").

Meeder Wealth Management & Summit

Committed to building long-term relationships and providing true value.

MEEDER WEALTH MANAGEMENT

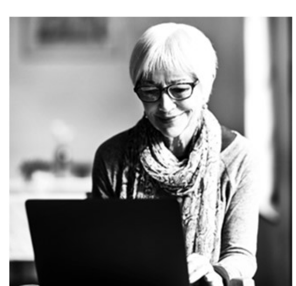
SUMMIT FINANCIAL

OUR COMMITMENT

- Fully committed to maintain our top priority as a client focused organization.
- Dedicated to maintaining high service levels across all existing and future relationships.
- Sustaining seamless operations as we continue to build on our already solid foundation.
- Committed to delivering personalized hands-on wealth management experience through our time-tested approach to create tailored and comprehensive strategies and assistance to clients.

SummitVantage™ is an all-inclusive platform of fully integrated services, thought leadership, and innovative technology.

- Elevated financial advice with the primary focus on deepening relationships.
- Access to premier professional services and investment solutions.
- Top-tier resources to provide the highest levels of service and value-add.



Expanded and Enhanced Services & Tools

We believe building a strong foundation is the best way to achieve exceptional results.

Enhanced capabilities in the way of expanded holistic planning, technology, and investment services truly elevates the investor experience.

01 HOLISTIC FINANCIAL PLANNING

- Access to the top financial planning tools
- Crafting personalized financial plans for sophisticated needs with our advanced planning team, featuring legal and tax professionals

02 TECHNOLOGY

- Innovative tech stack customized to enhance the client experience
- Integrated performance reporting and personalized applications

03 INVESTMENT SERVICES

- Open architecture platform to optimize asset allocation and diversification
- Investment team support with customized portfolio design and thought leadership
- Leading customized risk management tools

Holistic Financial Planning

A sophisticated, goals-based approach.

ADVANCED PLANNING

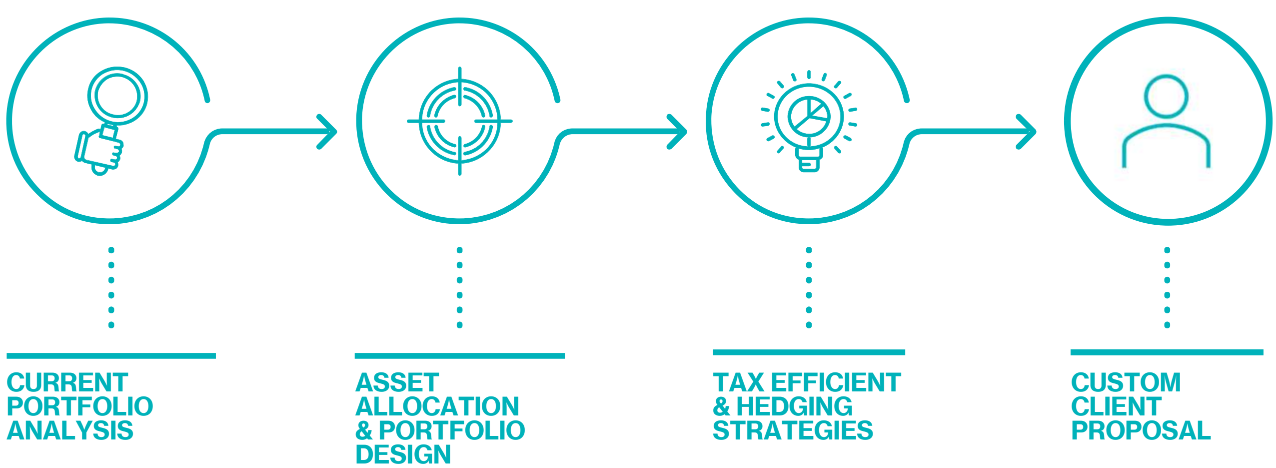
- Attorneys leveraging legal knowledge
- Comprehensive tax calculations
- Tax & estate multi-generational transfer planning
- Education funding analysis
- Charitable contribution planning
- Executive compensation/non-qualified deferred compensation planning
- Interactive retirement income planning
- Robust “what-if”/Monte Carlo scenario planning
- Document analysis and commentary

CORE PLANNING DESIGN

- Full team to support core plan design
- Cash flow planning, business continuity planning

PARA-PLANNING SERVICES

- Para-planning department dedicated to data input and planning support



Technology Enhancements

Innovation to future-proof your experience.

Fully integrated systems with auto sync, smart integration, and customized applications.

A FULLY INTEGRATED TECHNOLOGY PLATFORM

- Risk assessment and portfolio generation
- Trading and rebalancing
- Performance reporting
- Portfolio diagnostics and research
- Custodial partners
- Account management
- Planning tools and client portal

Expanded Investment Services

Elevating your investment experience. Sophisticated, institutional-caliber investments to create truly a personalized investment experience.

COMPREHENSIVE RANGE OF DIVERSIFIED INVESTMENT SOLUTIONS	• Mutual funds • ETFs/index funds • Private equity • Real estate investment trusts (REITs) • Exclusive private investments	• Separately managed account platforms • Custom managed portfolios • Environmental, Social, and Corporate Governance (ESG)
DEEP AND EXPERIENCED INVESTMENT TEAM	• Robust investment committee • Highly credentialed: CFAs, CPAs, CFPs, MBAs	• Over 20 years average length of experience • Rigorous initial and ongoing due diligence
LEADING-EDGE INVESTMENT TOOLKIT	• Open architecture to minimize conflicts of interest and to seek the best opportunities • Integrated suite of superior investment resources • Portfolio diagnostics and research • Risk management and rebalancing	• Alternative investments • Thought leadership • Economic/financial market newsletters • Monthly, quarterly, annual with special updates during significant market events
TRUE INSTITUTIONAL ACCESS	• Premier solutions from many providers • Rigorous and impartial research	• Flexibility to leverage the investment team

About Summit

Summit is one of the industry's prominent independent advisory firms. Founded four decades ago by a group of advisors, Summit has a proven legacy of success elevating advisor practices and client experiences.

Meeder Wealth Management's affiliation with Summit provides access to SummitVantage.™

An all-inclusive platform of fully integrated, industry-leading services, thought leaders, and innovative technology that makes delivering elevated financial advice frictionless.

This includes an in-house, institutional-caliber brain trust of tax, estate, insurance and financial planning experts that are now an extension of the Meeder team.

The Summit financial planning team includes admitted attorneys and/or CPAs who act exclusively in a non-representative capacity with respect to Summit's clients. Neither they nor Summit provide tax or legal advice to clients. Clients should make all decisions regarding the tax and legal implications of their investments and plans after consultation with their independent tax or legal advisors.

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