Nationwide Retirement Resource Group®

Financial Planning Process

Nationwide®

The Nationwide Retirement Resource Group offers comprehensive financial planning services to plan participants. The planning process involves participant interview, analysis preparation, and results discussion.

Participant interview

- Identify financial goals
- Understand goal funding and current progress
- Identify risk tolerance and investment preference
- Prioritize financial goals
- Nationwide will request electronic copies of financial statements and documents to build and prepare the analysis

Analysis preparation

- Enter data in Nationwide's financial planning systems
- Collect any missing or inaccurate data
- Nationwide sends invite to set up virtual appointment to review results

Review analysis and recommendations

- Walk participant through results and deliver client recommendations
- Discuss solutions that may solve for needs identified in financial analysis
- Review goal progress probability and any recommended changes
- Document any final steps and recommendations

To discuss how Nationwide can help you identify financial needs and solutions, contact the Retirement Resource Group.

Phone:
(866) 975-6363

E-mail:
investnw@nationwide.com

Appointment Scheduler
retirementspecialists.myretirementappt.com

Nationwide® is on your side

This material is not a recommendation to buy or sell a financial product or to adopt an investment strategy. Investors should discuss their specific situation with their financial professional.

Federal income tax laws are complex and subject to change. The information in this brochure is based on current interpretations of the law and is not guaranteed. Nationwide and its representatives do not give legal or tax advice. An attorney or tax advisor should be consulted for answers to specific questions.

Retirement Resource Group includes Retirement Specialists and Personal Retirement Counselors. Retirement Specialists are registered representatives of Nationwide Investment Services Corporation (NISC), member FINRA, Columbus, OH. The information they provide is for educational purposes only and is not legal, tax or investment advice. Personal Retirement Counselors are registered representatives of Nationwide Securities, LLC., member FINRA, SIPC. DBA Nationwide Advisory Services, LLC. in AR, CA, FL, NY, TX, and WY. Securities and Investment Advisory Services offered through Nationwide Securities, LLC, member FINRA, SIPC, and a Registered Investment Advisor. DBA Nationwide Advisory Services, LLC in AR, CA, FL, NY, TX and WY. Representative of Nationwide Life Insurance Company, affiliated companies and other companies.

The Nationwide Group Retirement Series includes unregistered group fixed and variable annuities and trust programs. The unregistered group fixed and variable annuities are issued by Nationwide Life Insurance Company. Trust programs and trust services are offered by Nationwide Trust Company, FSB. Nationwide Investment Services Corporation (NISC), member FINRA, Columbus, Ohio. Nationwide Mutual Insurance Company and affiliated companies, home office: One Nationwide Plaza, Columbus, OH 43215-2220.

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