

Nationwide Retirement Resource Group[®]

Financial Planning Process



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.



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Appointment Scheduler
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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.

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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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