

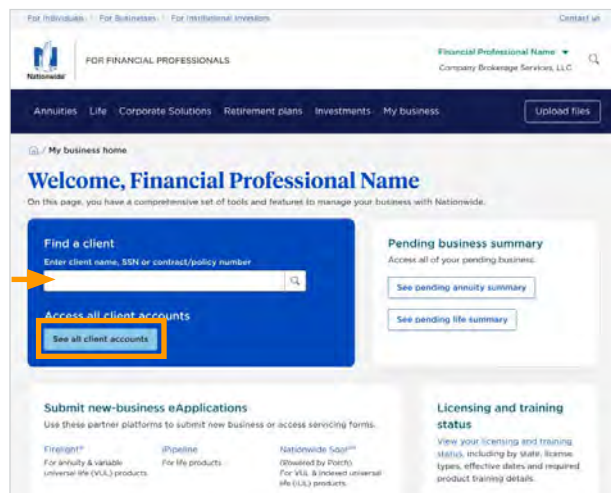


Quick reference guide

IUL allocation made simple

At Nationwide®, we're committed to empowering financial professionals with tools that make their work easier and more efficient.

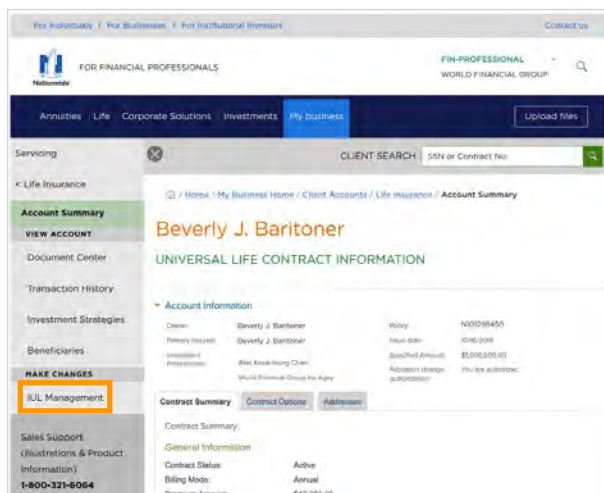
Our **self-service indexed universal life (IUL) allocation tool** streamlines policy updates, saving you time and effort so you can focus on building relationships and driving business growth.



Step 1

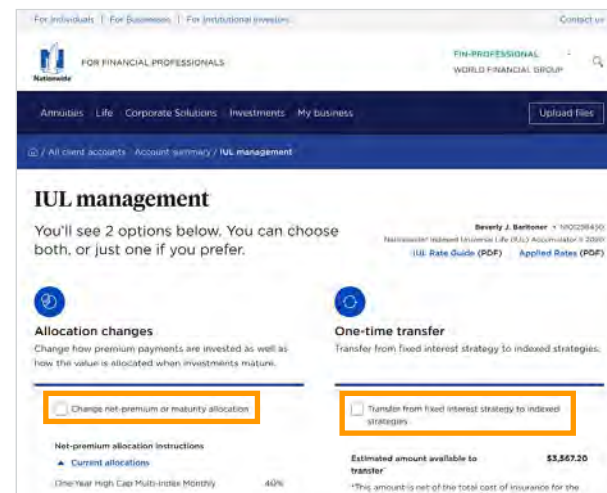
To get started, log in to **NationwideFinancial.com** and either:

- Enter specific policyholder information or
- Select **See all client accounts** to navigate to the policy you want to update



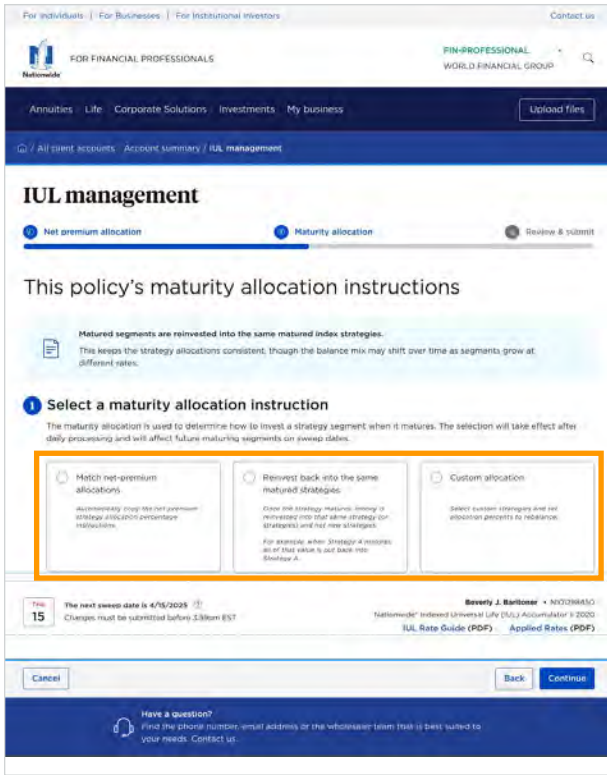
Step 2

Once you are at the policy level, select **IUL Management** in the toolbar at left.



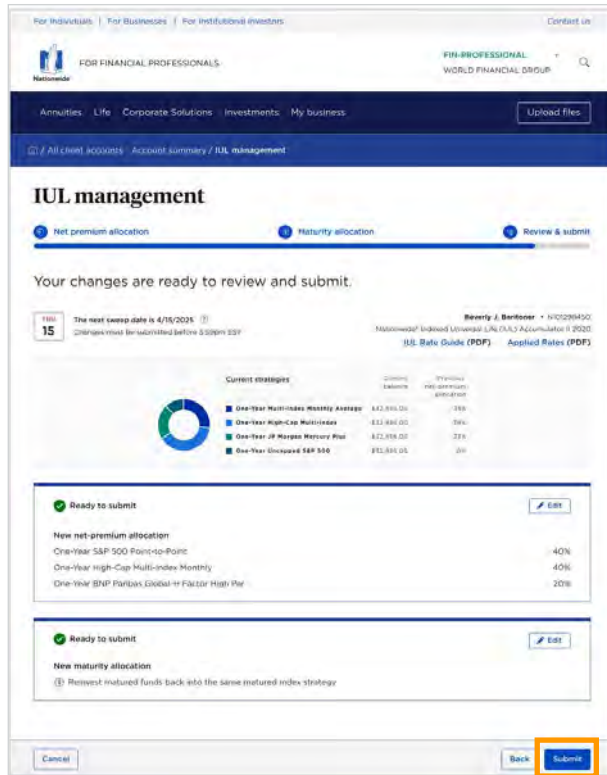
Step 3

Select the type of allocation needed, then choose how the premium payments should be allocated based on the available strategies.



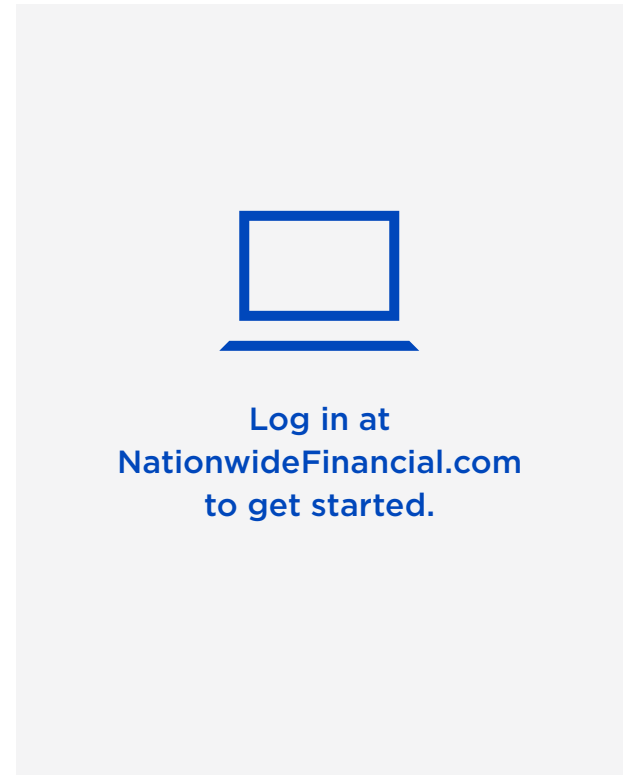
Step 4

Select an instruction for the maturity allocation.



Step 5

Finally, review your changes and select **Submit**.



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• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution • Not insured by any federal government agency • May lose value

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