



Nationwide Retirement Institute®

Your competitive advantage

You may know Nationwide® for its wide range of financial products, but there's a side to us you may not know. The Nationwide Retirement Institute® offers content and consultation on key financial subjects. You can leverage our thought leadership as you serve clients — which in turn can help differentiate your practice.



Our topics

Clients of all ages are saving and investing with the goal of being financial secure in retirement. The Nationwide Retirement Institute has developed comprehensive programs aligned with the 3 subjects that weigh on clients the most in retirement: finances, health and family.



Retirement savings and income

Our resources can help your clients plan and save for sustainable retirement income.

- Social Security optimization
- Tax-efficient retirement income
- Total retirement income planning



Health care costs and longevity

Our offerings can help your clients make decisions about covering health care costs and other considerations of aging, such as long-term care.

- Health care costs
- Medicare planning
- Long-term care planning and longevity



Legacy, estate and wealth transfer

Our materials can prepare you to help your clients with legacy, estate and wealth transfer issues.

- Estate planning and wealth transfer
- Building trust with empathy
- Land As Your Legacy®
- Business succession planning



Diverse Markets

Nationwide provides materials and research for financial professionals on a wide variety of consumer segments. Our offerings address considerations for:

- Asian consumers
- Black consumers
- Hispanic consumers
- LGBTQ+ consumers
- Rural consumers
- Women & Retirement



Our services

Think of the Nationwide Retirement Institute as your go-to source for dedicated people, materials and technology that support you as you help your clients through complex and unique situations.



One-on-one consultation

The **Retirement Institute Planning Team** provides consultation for financial professionals on retirement topics such as Social Security, Medicare, aging and estate planning, and tax-efficient retirement income.



CE and client education

The **Insights & Solutions Field Team** is composed of credentialed professionals who deliver live and virtual presentations to financial professionals, clients, plan sponsors and plan participants.



Complex case consultation

The **Advanced Consulting Group** specializes in financial and tax-planning strategies for challenging cases. Their expertise includes trust and estate planning, employee benefits, advanced strategies using life insurance and annuities, and business succession planning.



[Financial professional presentations](#) that qualify for state insurance and designation credit hours



[Client-facing presentations](#) covering topics such as Social Security, health care costs, long-term care, tax efficiency and legacy planning



Use our complimentary resources to help grow your practice

Turn to the Nationwide Retirement Institute to get support and expertise from industry professionals who want you to succeed. Our materials can help you drive deeper, more valuable relationships with your clients. You might even increase assets under management by identifying new opportunities in your community.



Visit the [Nationwide Retirement Institute online](#).



Take action today by reaching out to your Nationwide wholesaler.



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.

Nationwide and its representatives do not give legal or tax advice. An attorney or tax advisor should be consulted for answers to specific questions.

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