Nationwide®
is on your side

NATIONWIDE RETIREMENT INSTITUTE®

About
Social Security 360®

Why clients need help planning for Social Security

The decision on when and how to file for Social Security is one of the most important financial decisions clients make in their lifetimes. A married couple could potentially lose hundreds of thousands of dollars if they don't implement an optimal filing strategy versus filing early.[1]

The opportunity for advisors

In Nationwide's fourth annual Social Security survey of retirees and those nearing retirement, we found that 72% of future retirees would switch financial advisors to receive advice on Social Security benefits.[2] This shows how real and important the opportunity is for you to become your clients' go-to Social Security resource.

How we're helping advisors

Advisors need resources and tools that help break down and simplify the rules and options for Social Security.

With our Social Security 360 program, the Nationwide Retirement Institute® offers an end-to-end client-ready solution that brings together education on Social Security, a suite of client engagement materials, a Social Security analyzer tool for guiding well-informed filing decisions, and broad support for answering Social Security questions and developing income plans.

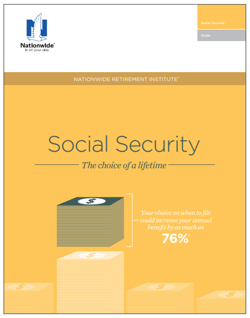
[1] Based on an individual with full retirement age of 66, comparing early filing at age 62 and receiving reduced benefits of 75% of primary insurance amount versus delayed filing at age 70 and receiving credits to increase benefits by 32% of primary insurance amount.

[2] Social Security consumer survey conducted by Harris Poll on behalf of The Nationwide Retirement Institute, 2018.

Social Security 360® resources

View available resources at nationwidefinancial.com/ss

EDUCATIONAL MATERIALS



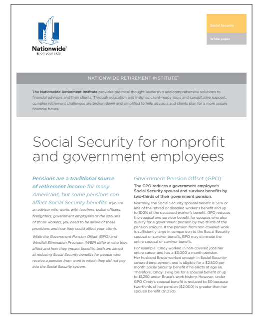
Education brochure
K-NFM-12200AO

This helpful guide for advisors and clients discusses the basic rules and options for Social Security planning.

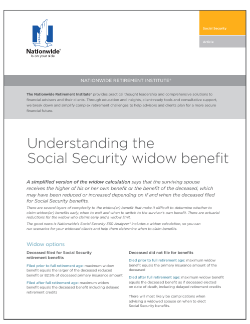
Introductory one-pager
NFM-13418AO

Introduce clients to the need for Social Security planning and how the Nationwide Social Security 360 program can help.

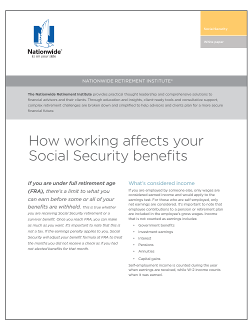
How to fix a mistake
NFM-13660AO



Considerations for public sector employees
NFM-13661AO



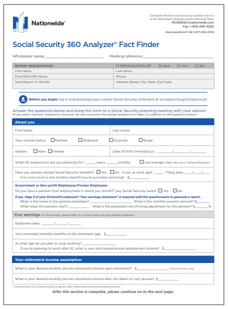
Widow benefits explained
NFM-13670AO



How working affects benefits
NFM-13671AO

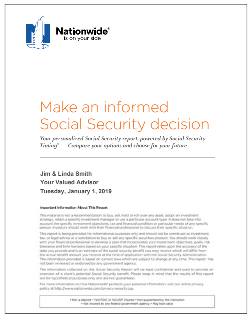
Social Security Quick reference guide
NFM-13655AO

SOCIAL SECURITY PLANNING TOOLS



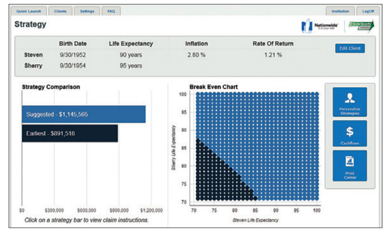
Client fact finder
NFM-11991AO

Advisors can use this fact finder to gather relevant client information for filing options with the Social Security 360 Analyzer.



Sample report
NFM-12323AO

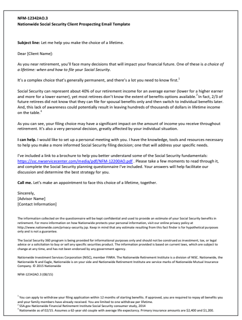
Share with clients what information they can expect to see on their Social Security report.



Social Security 360® Analyzer
NFM-12435AO

Our online tool helps advisors analyze and present Social Security options to clients, including personalized filing strategies, break-even and cash flow analyses.

CLIENT SEMINAR MATERIALS



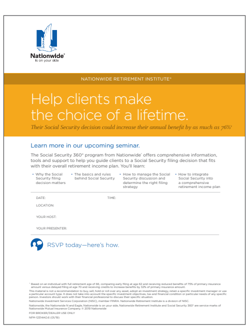
Client prospecting letter
NFM-12342AO

Client seminar invitation
NFM-12315AO
NFM-12315M1

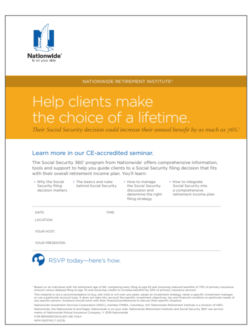
Client presentation
NFM-11701AO

Client seminar follow-up letter
NFM-12343AO

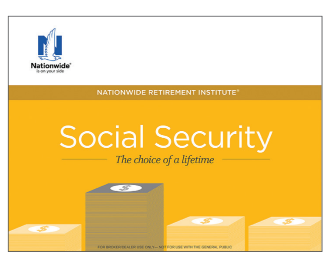
ADVISOR SEMINAR MATERIALS



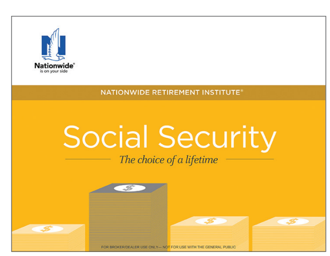
Advisor seminar invitation
NFM-12314AO



Continuing education seminar invitation
NFM-12437AO



Advisor presentation
NFM-11743AO



Continuing education presentation
NFM-12436AO

Support from Social Security specialists

Representatives from the Nationwide Retirement Institute® offer support to advisors through workshops, training and consultations on product solutions to help clients reach specific retirement planning needs.

In addition, the Income Planning Team assists advisors to turn knowledge, insights and strategies into actionable solutions for their clients:

- Help advisors interpret the program and strategy outputs and translate them into effective client conversations
- Aid advisors in thinking through case design options for given client scenarios
- Assist advisors in evaluating possible product types and product configurations that could work for given client scenarios

Reach out to your Nationwide® wholesaler for more Social Security 360 resources and information or to schedule an advisor or client seminar.

Call the Income Planning Team for help generating Social Security reports and making the Social Security strategies actionable for your clients: 1-877-245-0763.

Visit nationwidefinancial.com/360 for more information about the Social Security 360 program.

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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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