



NATIONWIDE RETIREMENT INSTITUTE®

Date:

Navigating the path to your retirement

Your journey toward retirement is unique to you. That's why we created a guide with questions that can help you start envisioning and planning for the type of retirement that's right for your goals, priorities and lifestyle.



The first step to planning for retirement is thinking about the type of retirement you'd like to have and where you'd like to spend it. This can help your financial professional better understand your priorities.

Envision your retirement

What would you like to do in your retirement (for example, travel or spend time on hobbies)? Do you see yourself living in a different location? What are important things your financial professional should know about the lifestyle you'd like to have?

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Take some time to consider the following questions and how they might apply to you and your life. Your answers can help your financial professional make better recommendations on how you can financially prepare for the retirement you desire.

Retirement income



What income sources do you expect to have in retirement (for example, Social Security benefits or pension plan)?

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Would you like to leave a financial legacy through a charitable donation or inheritance for your family? Or would you like to enjoy your entire retirement income?

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Caring for loved ones



*Do you anticipate a change in your role as a caregiver for loved ones?
If yes, when might you see this happening?*

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Your health care



*Do you have a medical history that could affect your future health? Are there medical
issues that run in your family that you want to be financially prepared for?*

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Your long-term care



*How would you like to be cared for in your late retirement years, should the need arise?
For example, would you like to be cared for in your own home, downsize to a smaller home,
or perhaps move to a retirement community?*

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Your financial professional is with you every step of the way

Share your answers with them so they can help you tailor a plan around your retirement needs and goals.



Nationwide[®]
is on your side

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