

Financial planning helps investors manage uncertain markets.

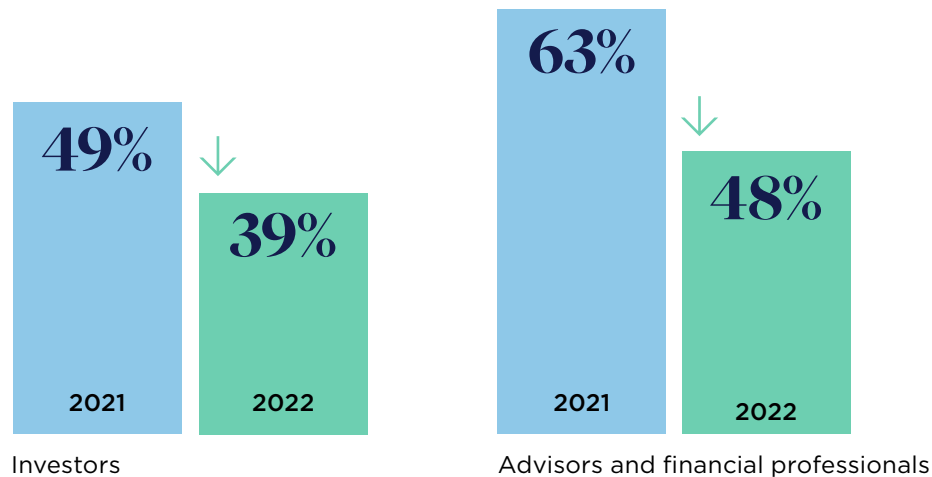


We're currently in a dynamic climate for markets and the economy. "Easy money" monetary policies are on the way out, interest rates are climbing and a possible recession looms on the horizon.

The eighth annual Advisor Authority survey, powered by the Nationwide Retirement Institute®, finds that investors are turning cautious in reaction to compounding economic and financial stresses. However, investors with financial plans in place feel more confident about their preparations. That reveals an opportunity for financial professionals to build trusted relationships through financial planning.

Economic worries have dampened optimism.

Optimism around the 12-month financial outlook has changed in the past year.



Investors biggest financial concerns in the next 12 months.



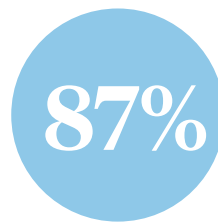
Inflation showed a huge increase, up significantly from 29% in 2021.

Confidence in financial planning remains strong.

Having a plan helps investors...



Feel in control of their investments





Feel confident in their investment decisions



How financial professionals can help.

Investors today want to feel confident about their ability to retire, no matter what is happening in the world. As a financial professional, you are in position to bring financial planning knowledge to more clients, helping them build confidence about their financial futures.

 Just over half of investors (55%) currently work with an advisor or financial professional

 For the other 45%, financial planning presents an opportunity to build strong, lasting client relationships through financial planning.

Turn to Nationwide for resources and support as you extend your financial planning knowledge and capabilities.



Get ongoing resources to help address client concerns on the markets and economy at blog.nationwidefinancial.com/markets-economy/



Survey methodology: The eighth annual Advisory Authority Survey was conducted online within the United States by Harris Poll on behalf of Nationwide Advisory Solutions from July 27 – August 16, 2022 among 506 financial advisors and 521 investors, ages 18+. Among the 506 financial advisors, there were 266 RIA/Fee-based, 188 BD Advisors, 136 Wirehouse, and 54 Other advisors – advisors may fall into more than one category. Among the 521 investors, there were 105 Mass Affluent, 103 Emerging High Net Worth, 103 High Net Worth and 105 Ultra High Net Worth. Investors are weighted where necessary by age, gender, race/ethnicity, region, education, income, marital status, household size, investable assets and propensity to be online to bring them in line with their actual proportions in the population.

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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