

# Nationwide Retirement Resource Group®

## Financial Planning Process



The Nationwide Retirement Resource Group® offers comprehensive financial planning services to plan participants. The planning process involves a participant interview, analysis preparation and a discussion of the results.



### Participant interview

- Identify financial goals
- Understand goal funding and current progress
- Identify risk tolerance and investment preference
- Prioritize financial goals
- Nationwide will request electronic copies of financial statements and documents to build and prepare the analysis



### Analysis preparation

- Enter data in Nationwide's financial planning systems
- Collect any missing or inaccurate data
- Nationwide sends an invitation to set up a virtual appointment to review the results together



### Review analysis and recommendations

- Walk the participant through the results and deliver client recommendations
- Discuss solutions that may solve for the needs identified in financial analysis
- Review goal progress probability and any recommended changes
- Document any final steps and recommendations



To discuss how Nationwide can help you identify financial needs and solutions, contact the Retirement Resource Group.



Phone:  
1-866-975-6363



Email:  
[investnw@nationwide.com](mailto:investnw@nationwide.com)



Appointment Scheduler  
[retirementspecialists.myretirementappt.com](https://retirementspecialists.myretirementappt.com)



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.

Federal income tax laws are complex and subject to change. The information in this brochure is based on current interpretations of the law and is not guaranteed. Nationwide and its representatives do not give legal or tax advice. An attorney or tax advisor should be consulted for answers to specific questions.

Retirement Resource Group includes Retirement Specialists and Personal Retirement Consultants. Retirement Specialists are registered representatives of Nationwide Investment Services, member FINRA, Columbus, Ohio. The information they provide is for educational purposes only and is not legal, tax or investment advice. Personal Retirement Consultants are registered representatives of Nationwide Securities LLC, member FINRA, SIPC, DBA Nationwide Advisory Services LLC in AR, NY, TX and WY. Securities and investment advisory services are offered through Nationwide Securities LLC, member FINRA, SIPC, and a Registered Investment Advisor DBA Nationwide Advisory Services LLC in AR, NY, TX and WY. Representative of Nationwide Life Insurance Company, affiliated companies and other companies.

Nationwide, the Nationwide N and Eagle and Retirement Resource Group are service marks of Nationwide Mutual Insurance Company. © 2024 Nationwide

PNM-16035AO.1 (03/24)