Nationwide Retirement Resource Group®

Financial Planning Process

Nationwide®

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.

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Appointment Scheduler
retirementspecialists.myretirementappt.com

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