



Investment  
Solutions Builder®

Overview Brochure

Manage core funds  
and create asset  
allocation models.

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# Investment Solutions Builder<sup>®</sup>

An online tool allowing you to manage core funds and create and maintain asset allocation models for an individual plan or across all your plans

Our web-based investment modeling tool was designed with input by advisers and is unlike any other in the industry today. For fee-based plans only, Investment Solutions Builder focuses on **three key areas**:

## 1 Control

Your clients are looking to you to help manage aspects of their fund lineup. Investment Solutions Builder puts you in the driver's seat.

## 2 Flexibility

You can work online, anytime. Investment Solutions Builder also offers access to more than 1,200 fund options, so you can make the best-suited choices for your clients.

## 3 Client Value

Investment Solutions Builder allows you to show your expertise, offer real-time solutions and build stronger relationships. Ultimately, it may help you win and retain retirement plans.

# Key Features of Investment Solutions Builder

## Manage core funds.

Historical Performance										
Select	Fund Name	Morningstar Category	Ticker	YTD	1-yr	3-yr	10-yr	Inception	Inception date	Gross Expense Ratio
<input type="checkbox"/>	AmCent ST Govt A	Short Government	TWAYX	-0.55	1.46	-0.55	-0.55	-0.55	12/15/1982	0.61
<input type="checkbox"/>	AmCent Shrt Dur A	Short-Term Bond	ACSQX	-0.55	2.44	-0.55	-0.55	-0.55	11/30/2006	0.86
<input type="checkbox"/>	AmFds Intmd Bd Fd Am R3	Short-Term Bond	RBOCX	-0.55	3.78	-0.55	-0.55	-0.55	02/19/1988	0.99
<input type="checkbox"/>	BlkRk Low Dur Bd Inv A	Short-Term Bond	BLDAX	-0.55	4.50	-0.55	-0.55	-0.55	01/12/1996	1.16
<input type="checkbox"/>	DWS Shrt Dur A	Ultrashort Bond	SDUAX	-0.55	2.55	-0.55	-0.55	-0.55	03/13/1995	1.08
<input type="checkbox"/>	EV Govt Obligns A	Short Government	EVGOX	-0.55	3.77	-0.55	-0.55	-0.55	08/24/1984	1.15
<input type="checkbox"/>	FidAdv Shrt Fxd Inc A	Short-Term Bond	FSFAX	-0.55	2.99	-0.55	-0.55	-0.55	09/16/1987	0.71
<input type="checkbox"/>	GdmnSec Shrt Dur Govt A	Short Government	GSSDX	-0.55	1.41	-0.55	-0.55	-0.55	05/01/1997	0.88
<input type="checkbox"/>	GdmnSec UltraShrt Dur Govt A	Ultrashort Bond	GSAMX	-0.55	-0.36	-0.55	-0.55	-0.55	05/15/1995	0.87

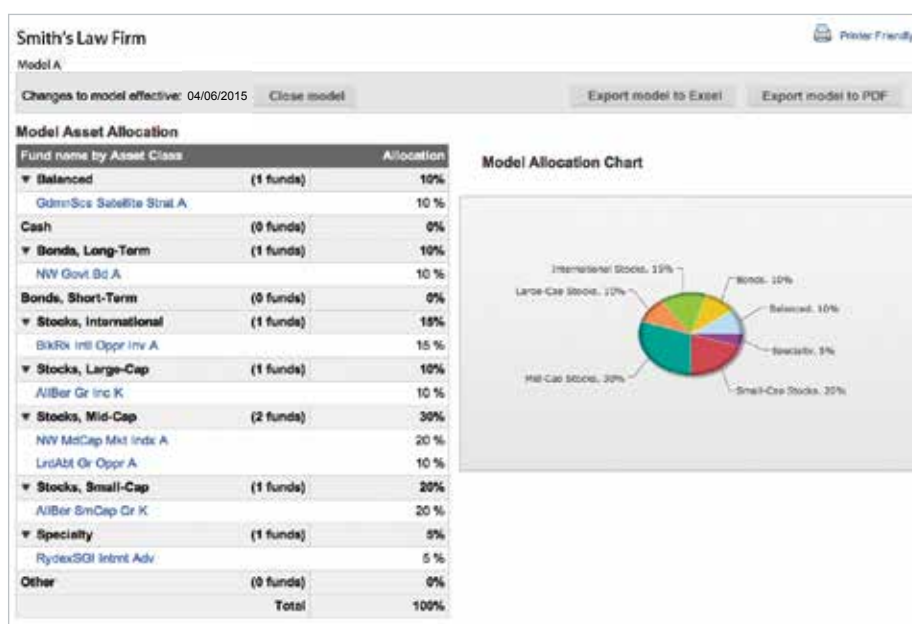
Add selected to model

Use your expertise to manage core funds for your plans.

- See all of the available fund options in the program and filter based on asset class or asset category
- Access detailed fund information such as performance, ratings, fees and risk measures
- Establish and change fund investment lineups—real time or up to 90 days in the future<sup>1</sup>

<sup>1</sup> Fund additions require 10 business days' advance notice.

## Create and maintain asset allocation models.



Use your expertise to create and maintain asset allocation models for plan participants.

- Access detailed fund information such as underlying fund performance, ratings, fees and risk measures to facilitate the selection of funds and monitoring of models
- Add alternative funds to your models that are not part of the core fund lineup
- Provide a model selection risk questionnaire for participants who are considering an asset allocation model
- Establish and change models — real time or up to 90 days in the future<sup>1</sup>
- Set automatic rebalancing for models on a calendar quarter, semiannual, annual or date-specific basis<sup>2</sup>

<sup>1</sup> Fund additions require 10 business days' advance notice.

<sup>2</sup> Feature may not be approved for use by all broker/dealers.

A man with grey hair, wearing a dark suit jacket, a blue and white checkered shirt, and a dark tie, stands in front of a brick wall. He is looking towards the camera with a slight smile. The background is a light-colored wall.

## Supported platforms

Investment Solutions Builder is available for use with any of our fee-based trust platforms.

## Access to Investment Solutions Builder

- The tool is located on the Nationwide® Sales & Service Center website at [nationwidefinancial.com/retirementplans](https://nationwidefinancial.com/retirementplans)
- Before getting access to the tool, you'll need a completed Firm Acknowledgement Form and Plan Usage Agreement

# Learn more about how Nationwide® can partner with you:



1-800-626-3112



[nationwidefinancial.com/retirementplans](http://nationwidefinancial.com/retirementplans)



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