Nationwide®
is on your side

Retirement Solutions | Business Builder Program overview

Dedicated support to help build your retirement plans business in four compelling ways

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The Nationwide® Business Builder Program

Nationwide® knows that while retirement plans are a productive addition to your book of business, identifying, establishing, servicing and supporting these plans may seem challenging.

With a solid foundation and a customized approach, we are structured to handle plans of any size across any industry. But more importantly, we know that it's not just about what we do; it's how we do it.

Through our Business Builder Program, we go above and beyond to do the right thing at the right time so you get a better partner.

To learn more about how Nationwide does the right thing at the right time, contact us or request a meeting today:

1-800-626-3112

To request a meeting, scan the QR code or visit https://bit.ly/3PnLos2

Comprehensive support that delivers value to your business

Our comprehensive support model centers around you, aiming to simplify retirement plan management, deliver better experiences and help build your business.

When you partner with us on a retirement plan, we support you at every point of the process:

- Presale
- Point of sale
- Post-sale
- Ongoing service and support

Presale

Prospecting support that is strategic and productive

IDENTIFY: We leverage social media and industry data to identify decision-makers who may be open to a change.

EVALUATE: We use IRS Form 5500s and industry data to evaluate the greatest opportunities.

EXECUTE: We help you determine plan sponsors' needs and provide prospecting tools to help you turn leads into clients.

Flexible retirement programs built for you

SELECT: We offer competitively priced mutual fund-based trust programs designed to help meet your and your clients' needs based on plan size. Each program offers you flexible compensation options — fee-based or commission.

Nationwide Retirement Flexible Advantage® gives you flexibility and control through a customizable retirement plan with award-winning,[1] dedicated support.

Nationwide Retirement Flexible Advantage® Foundations provides simplicity and fiduciary protection with IRON Fiduciary, an offering by Creative Planning LLC.

Helping your plan sponsors understand their level of fiduciary responsibility

CHOOSE: We help you understand what it means to be a plan fiduciary and what it takes to keep the plan compliant.

Point of sale

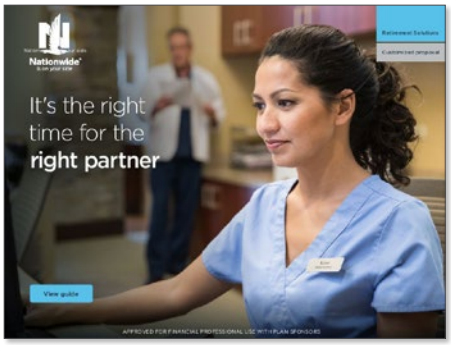
Helping you win the plan

PARTNER: Your wholesalers can help you:

- Understand the program that best fits your and your client's needs
- Understand pricing and compensation modeling
- Illustrate investment options
- Compare providers
- Partner with a plan administrator
- Build and deliver a customized retirement plan proposal

Your wholesaler can also accompany you to the point of sale meeting to help you explain the details of the platform and answer questions.

SUPPORT: Based on the information you provide, you receive a customized plan proposal kit, a formal presentation and an interactive demo to use for your point-of-sale meetings.



[1] DALBAR Plan Participant Service Award, 2014-2021.

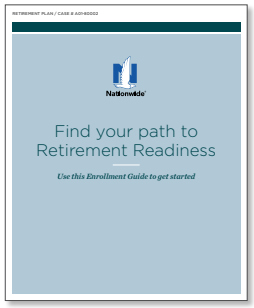
Post-sale

We make transitioning to Nationwide easy with our dedicated support and extraordinary care. Plan sponsors and participants are supported by our highly engaged, U.S.-based associates.

Dedicated resources for plan setup, education, enrollment and asset consolidation

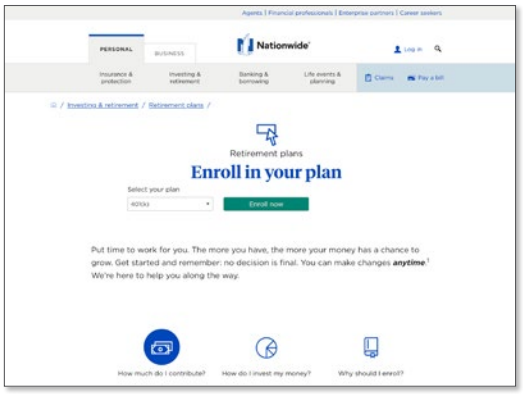
IMPLEMENT: Your implementation manager is your primary contact through the setup of new plans, and works with you and your plan sponsor for all onboarding needs.

Your field service representative coordinates with you and the plan sponsor on a plan for education and enrollment.



ENROLL: We provide a consultative and simplified enrollment process.

We offer a variety of tools and solutions, including a tablet-based enrollment process, to educate your participants and give them the right information to drive retirement readiness. We can also include a customized asset allocation model as the plan's default QDIA solution, which can be named after you or your business.



Ongoing

Education and service that is easy and efficient

ENGAGE: Our REALtirement℠ education is available in English and Spanish, and helps meet participants where they are on their path to retirement readiness.

EDUCATE: We provide insights, tools and educational resources to support participants saving toward their retirement goals. Participants and plan sponsors are supported by award-winning[2] service and experiences.

ACCESS: Our website allows participants to access helpful, up-to-date retirement planning data and their personalized retirement readiness report. The simplified navigation system and responsive design can be accessed on a wide range of devices.

MONITOR: Our financial professional experience includes:

- Simplified administration through a single website
- The ability to mirror a participant's account for a better 1:1 interaction
- Dedicated education, enrollment and asset consolidation support on your behalf
- Award-winning service[2]

Our plan sponsor experience includes:

- Digital task management
- Customizable plan health reporting
- Newsletters to help proactively improve plan health

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[2] DALBAR Plan Participant Service Award, 2014-2021.

Nationwide®

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.

Neither Nationwide nor any of its affiliates are related to or affiliated with IRON Fiduciary, an offering by Creative Planning LLC.

The Nationwide Group Retirement Series includes unregistered group fixed and variable annuities and trust programs. The unregistered group fixed and variable annuities are issued by Nationwide Life Insurance Company, Columbus, Ohio. Trust programs and trust services are offered by Nationwide Trust Company, FSB. Nationwide Investment Services Corporation, member FINRA, Columbus, Ohio.

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