

## NATIONWIDE RETIREMENT INSTITUTE®

For over a decade, the Nationwide Retirement Institute has been focused on its mission to provide practical thought leadership and actionable solutions to improve financial health and retirement outcomes. From insights to consultative education to actionable tools, the Nationwide Retirement Institute provides expertise and resources on retirement planning concepts that include Social Security optimization, healthcare and long-term care considerations and tax-efficient retirement income.

### **Social Security**

The Social Security 360® program offers an end-to-end consumer-ready solution that combines education on Social Security, a suite of client engagement materials, a comprehensive tool for guiding well-informed filing decisions and broad support for answering commonly asked questions and developing income plans.



### **Health Care**

The Health Care program helps simplify the complexity of Medicare and health care costs in retirement. The program's suite of education materials, tools, including the Health Care Cost Assessment, and hands-on support help quantify health care costs so a plan can be created to manage those costs in retirement.



### **Long-Term Care**

The Long-Term Care program helps simplify the complexity of long-term care costs in retirement. The program's suite of education materials, tools, including the Long-term Care Cost Assessment, and hands-on support help quantify long-term care costs and so a plan can be created to manage those costs in retirement.



### **Health Savings Accounts (HSA)**

The Health Savings Account program offers a deeper look at how HSAs can be used as an additional way to save for retirement. Our educational material examines how HSAs can be a potential retirement savings vehicle, an effective complement to 401(k) or 457(b) to help consumers better plan for health care costs in retirement.



### **Women & Retirement**

The Women and Retirement program provides deeper insights into the unique challenges women face related to Social Security, health care and long-term care as they prepare for and live in retirement. This program will help identify the key questions females should be asking as they prepare for and live in retirement.



### **Tax Efficient Retirement Income**

The Tax-efficient Retirement Income program provides insight into how taxes can impact retirement income plans. This program provides insights into consumer concerns and the help they want to create sustainable retirement income through a better understanding of tax-flexibility, tax bracket placement and combinations of income and sequencing strategies.



### Resource Legend



In person / Virtual Meetings



Consultative Support



Analysis Tool



Continuing Education



**Nationwide®**

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