Nationwide Retirement Solutions Workshops

Enrollment – three versions of this workshop are available – a 30-minute presentation, as well as 10-minute and 6-minute presentations. The workshop features the benefits of planning for retirement via employer-sponsored supplemental retirement plans. Evaluating how pension plans provide part of what is likely necessary for retirement and the concepts of tax-deferring, compounding and how to invest (with appropriate disclosures) are included. Security, Simplicity and Control are the key messages.

Asset Allocation – presents why asset allocation is important and walks participants through identifying their personal investment profile by looking at time horizon and risk tolerance. Investment types and asset classes are also addressed. Plan Highlights should be used with the presentation.

Countdown to retirement – features four steps to follow if a participant is within 1 – 10 years of retirement.

Closing Your Retirement Gap – helps participants identify what they have in retirement assets versus what they need for retirement, and prepare an action plan to help close the gap. The concept of asset allocation and high-level debt reduction strategies are presented.

Digging Up Dollars Reducing Debt – helps participants recognize signs that they are carrying too much debt, learn the true cost of debt, discover four keys to using credit wisely, and realize why it is important to convert debt reduction to a retirement investment.

DROP Workshop – identifies how DROP works, compares spending DROP assets now or later, and the benefit of investing DROP in a tax-deferred plan (5-slides).

How to Manage Investment Risk – defines the main types of investment risks and helps participants learn three ways to manage investment risk and prepare an action plan toward that end.

Investment Options Basics – enables participants to discover investment types, identify different investment styles, and apply investment basics to your deferred compensation account.

Three Steps to Retirement – poses three questions and assists participants in identifying answers for their personal situation: *how much income will you need, how do you make it last and how do you get it?*

Women & Retirement – examines the current state of retirement for women, looks at financial components of retirement and how each works, and helps participants find their retirement gap and discover ways that might increase retirement income.