



Nationwide® Retirement Solutions

# Nationwide RetireAssist Connect<sup>SM</sup>

## A suite of services delivered with extraordinary care

Nationwide® can service both a pooled employer plan (PEP) and a group of plans (GoP) to help meet the unique needs of your retirement plan clients.

A PEP includes a new role not available in other plan types: the pooled plan provider (PPP). The PPP oversees all financial professionals, 3(38) investment fiduciary managers and administrators in the PEP.

Previous pooled plans required these employers to have similar attributes, such as industry or geographic location, but now any nonaffiliated employer qualifies to be included in a PEP.

A GoP is a collection of traditional single-employer plans.

### Benefits of group plans

#### Both plans

Single 5500 form

No common nexus required

Specialized independent service providers

Reduced administrative and fiduciary duties

Cost-effective suite of solutions

Simplified day-to-day plan operations

#### PEP only

Shared audit cost

Includes a pooled plan provider: a unique role that oversees all included service providers

#### GoP only

Individual plan costs only

No plan merger required; plans can continue to maintain their own plans as written

# Nationwide RetireAssist Connect<sup>SM</sup>: Your team

Nationwide partners with a variety of service providers, offering you flexibility and expertise in managing your plan.

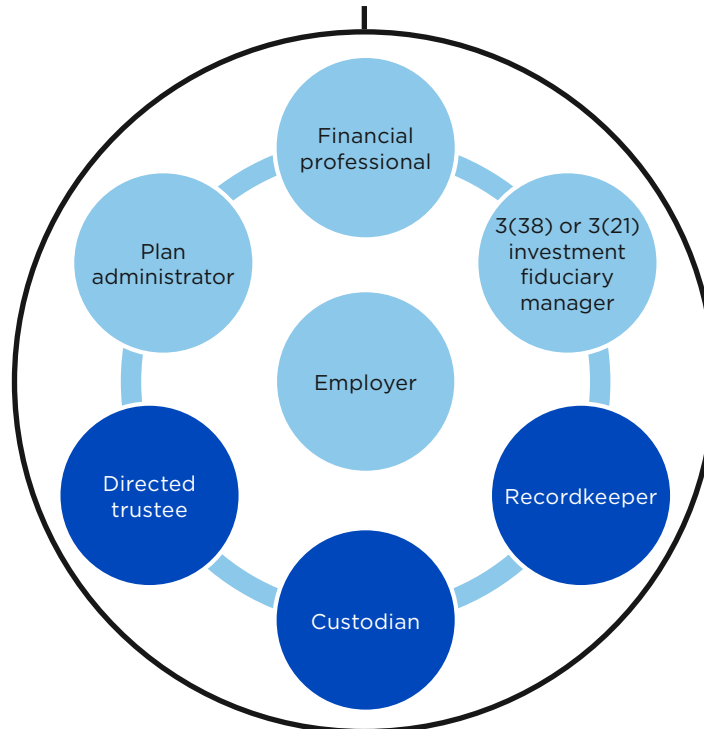
## Pooled plan provider (for PEP) or 402(a) named fiduciary (for GoP)

This entity acts as the named fiduciary of the plan and has the overall authority to control and manage the operation and administration functions, including overseeing all plan service providers.

### Financial professional

May assist plan sponsors/employers in determining a retirement plan solution and provides ongoing participant enrollment/education support

### Pooled plan provider (PPP)



### Plan administrator

Assists with administrative functions such as plan design, compliance testing, distributions, etc., as well as 3(16) services

### 3(38) or 3(21) investment fiduciary

Provides fiduciary investment services



### Directed trustee

Subject to the direction of a named fiduciary of the plan



### Recordkeeper

Provides services including but not limited to tracking contributions, earnings, investments and disbursements

### Custodian

Responsible for the safekeeping of plan assets but does not control them

# The Nationwide<sup>®</sup> difference

As a recordkeeper and custodian, we provide:

- ✓ Cybersecurity
- ✓ A seamless digital experience
- ✓ Participant and plan sponsor education
- ✓ Financial wellness tools
- ✓ Access to add Fund Window
- ✓ Nationwide Account Pledge
- ✓ A fully transactional mobile app
- ✓ Quarterly statements
- ✓ Participant and plan sponsor support



## Award-winning service

We've earned DALBAR's Plan Participant Service Award for the highest tier of Service Center Support every year since 2014.

# It's the right time for the right partner

We have a foundation and heritage you can trust and a customized approach that meets participants where they are. We know it's not just about what we do; it's how we do it.

### BETTER PARTICIPANT EXPERIENCES



We offer a variety of tools and solutions designed to educate your participants and give them information that supports retirement. Our solutions are both simple and comprehensive; this helps your employees know where they're going.

### ADMINISTRATIVE SIMPLICITY



We provide thought leadership and serve as your partner by breaking down challenges and offering clear solutions.

### EXTRAORDINARY SERVICE



We're a U.S.-based company that's more than just a business. We're committed to creating a brighter future for our communities.



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.

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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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