



TRAILHEAD

ASCENT

SUMMIT

TRAILHEAD CHECKLIST



READ OUR ARTICLES TO LEARN MORE ABOUT THE TOPICS BELOW

- ☐ **Five steps to financial wellness:** Get five tips that can help you make positive money habits part of your everyday life.
- ☐ **The power of compounding:** Learn more about how you can use compounding as a powerful engine for account growth.
- ☐ **How do I pay off debt and save at the same time?** Learn about an approach to pay off existing debt and save for retirement at the same time.



USE OUR INVESTING AND PLANNING ACTIONS TO KEEP YOUR ACCOUNT UP TO DATE AND ON TRACK

Investing actions

- ☐ **Enroll:** Don't miss out on all that Savings Plus has to offer you on your journey to retirement readiness.
- ☐ **Set up auto increase:** Select a percentage or dollar amount to automatically increase your contributions each year.

Planning actions

- ☐ **Create your online account:** With an online account, you have access to your information when it is most convenient to you.
- ☐ **Attend a webinar:** Register for one of our webinars, which can help you make decisions about managing your money and planning for retirement.
- ☐ **Download the My Retirement by NationwideSM mobile app:** Stay up to date with quick, 24/7 access to your retirement accounts.
- ☐ **Turn on Nationwide Account Lock:** Add extra security to your account and proactively lock your account from distributions until you're ready to take withdrawals.
- ☐ **Enroll in e-delivery:** Sign up for e-delivery and get timely communications about retirement readiness, resources and more.



USE ONE OF OUR TOOLS TO HELP WITH YOUR RETIREMENT READINESS

- ☐ **My Interactive Retirement PlannerSM:** Get a comprehensive view of how ready you might be for retirement. Set a retirement goal, track your progress and review options for improving your retirement outlook.
- ☐ **Paycheck Impact Calculator:** Get an estimate of how your take-home pay would be affected by increasing or starting contributions.
- ☐ **My Investment PlannerSM:** Identify your investment style and find a mix of investment options that could be right for you.



Scan the QR code to complete the steps.



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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