



**Nationwide®**  
is on your side

## Why Nationwide?



**Better participant experiences**



**Administrative simplicity**



**Values that translate to service**

### We offer **better participant experiences** that deliver meaningful outcomes through:

- **Experienced teams** assigned to the plan, including Relationship Managers and Retirement Specialists committed to building relationships and proactive outreach.
- **100% U.S.-based** Solution Center Representatives providing one of the highest support availability rates for participants in the industry.
- **Industry-leading<sup>1</sup> digital tools and technologies** that help participants plan for and live in retirement while also protecting data and assets with features like Nationwide Account Lock.
- **Participant Engagement Program** that delivers personalized education and nudges, motivating more participants to engage with their plan and take action.
- **Comprehensive financial planning** provided by professionals who have earned and maintain the CFP® designation at no cost to the participant, regardless of account size.

**Extensive access and assistance to help participants feel confident and at ease.**



**You can expect:**

- **No talk time limits**
- **No pressure**
- **No cross-selling**
- **No hidden agendas**



**We're available when you need us most:**

- More than **200 registered representatives**
- Average speed to answer is **17 seconds\***
- Six-day **availability**
  - Mon – Fri: 8 am – 11 pm ET
  - Sat: 9 am – 6 pm ET



## We offer **administrative simplicity** that relieves your burdens and improves efficiency.

- Dedicated administration that gives you **direct access** to the plan's assigned Account Manager
- **Same-day request response** from our 100% U.S.-based team
- **Proprietary recordkeeping system** allowing us to customize and tailor to plan needs
- Integration with **any payroll provider**, platform, or software
- **Same-day processing requests<sup>2</sup>**
- **One-day blackout** period and a tenured transition resource team with experience transitioning plans of all sizes from all providers

## Our **core values** translate into extraordinary care and service.

- As a mutual, **we serve your long-term interests** – not Wall Street's.
- Our associates are committed to providing the **highest level of care and service**.
- We're on **Fortune's Best Companies to Work For<sup>3</sup>** and People's Top Companies that Care<sup>4</sup> lists.
- As your trusted partner, we will collaborate to deliver **solutions, technologies, and enhanced experiences** that fit your needs.
- **We give our time and talents** to better the communities in which we live and work, with over 1.3 million volunteer hours since 2000.



### Our Values:

- We **value people**
- We are **customer-focused**
- We act with **honesty, integrity, trust, and respect**
- We work together to deliver **exceptional results**

# 100

- Approaching 100 years old
- Fortune 100 company
- 100% U.S.-based Retirement Solutions Call Centers and plan servicing

 **32k**  
RETIREMENT PLANS<sup>5</sup>

 **2.7M**  
PARTICIPANTS<sup>5</sup>

- **Founded in 1926, we are a mutual company that answers to our members.**
- **Our mission is to protect people, businesses, and futures with extraordinary care.**
- **We serve all types of plans: 401(k), 457(b), 403(b), 401(a)**

1. DALBAR Web Communications Excellence Seal 2014-2023  
 2. Assumes requests are received in good order  
 3. <https://fortune.com/ranking/best-companies/>  
 4. <https://people.com/human-interest-people-100-companies-that-care-7749999>  
 5. Nationwide Financial (Dec. 31, 2023)  
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