

**Nationwide Retirement Institute®** | Tax-efficient retirement income

# Learn savings and withdrawal strategies to achieve greater tax efficiency

Changing tax rules can be overwhelming for many people, but they often lead to planning opportunities you need to know about. The Nationwide Retirement Institute's tax-efficient retirement income program provides regularly updated education and insights to help:

- ✓ Add years to the life of the retirement portfolio
- ✓ Improve levels of after-tax income
- ✓ Add to the estate value for heirs

## Experience an easier way to learn about tax efficiency

**Nationwide's tax-efficient retirement income** program features continuing education presentations designed to deepen your knowledge of how tax-efficient income strategies can benefit your clients. Our resources can help you to:



Refresh your knowledge of **tax basics**, including which investment accounts are taxable, tax deferred or tax free



Deepen your familiarity with tax-efficient **savings opportunities** up to and through retirement



Consider different **account sequencing strategies** for your client to draw retirement income with tax efficiency

• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution  
• Not insured by any federal government agency • May lose value

## Get started today with our helpful resources, including:

- A retirement savings worksheet that educates clients and analyzes sources of retirement income
- A client seminar that shows how tax-efficient planning can pay off
- A tax planning quick reference guide that provides easy access to current tax brackets and savings plan contribution limits



Start the conversation with your clients by downloading our tax resources at [Nationwide.com/SimplifyTaxEfficiency](https://Nationwide.com/SimplifyTaxEfficiency). Or if you have your smartphone handy, scan this QR code to learn more.



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