



Nationwide®
is on your side

Nationwide® Business Solutions Group | Retention team

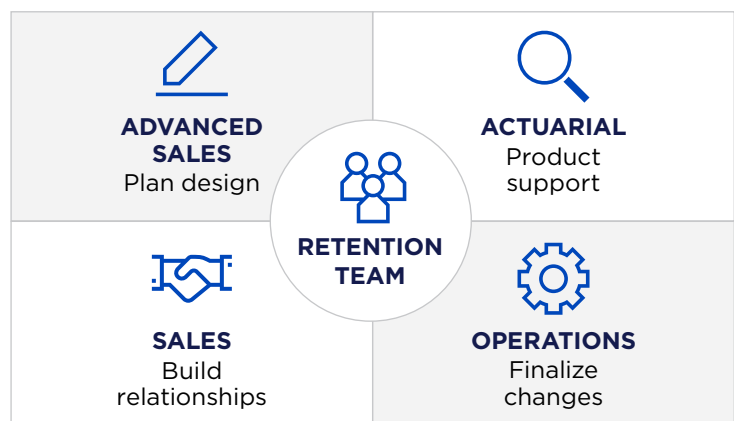
Resources dedicated to helping you grow and maintain your business

A key to growing your business is maintaining strong relationships with your existing clients. As their needs change, they look to you for solutions to help them grow. Since 2005, NBSG has had a Customer Retention team dedicated to helping advisors such as you support clients through the decision-making process by providing the most relevant options to meet their needs.

To date, **over \$3.4 billion in client assets have been retained** as a direct result of our efforts, leading to an **average annual retention rate of over 98%** since 2010.

We're here to help with everything from product pricing through post-issue support.

Nationwide is committed to the COLI and BOLI marketplace. The functional areas within Nationwide Business Solutions Group, from product pricing to post-issue support, are resources dedicated exclusively to servicing your clients.



Our approach to retention

When your clients call with questions or concerns, we're here to help. Additionally, our team helps take the guesswork out of customer retention by monitoring our cases and identifying retention opportunities. When an opportunity presents itself, we reach out to you and provide the support necessary to help you address your client's needs. The following chart outlines our three-phase approach to retention:

Awareness	Education	Solutions
A critical part of retention is identifying cases that pose a lapse/surrender risk. We use a combination of data mining and third-party news monitoring to accomplish this. Once a case is identified, we work closely with the advisor to raise awareness of the potential risk.	Whether you need a refresher or a deep dive into a topic, we're here to address your questions. Our team is also responsible for maintaining a robust training program that ensures our associates are well-equipped to serve your needs.	When you're ready to work with your client, we'll help you identify the alternatives available to help them decide what's right for them. After discussing the options you'd like to present, we can provide illustration support to show how these options will function over time.



Let us help you

We're available to discuss retention efforts in further detail or chat about a specific case.

Your Retention team contacts

Your Regional Sales team contacts



Nationwide[®]
is on your side

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

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