



# Help improve participants' retirement readiness



A recent survey<sup>1</sup> revealed that employees want help with planning for retirement and are looking to you for that help. In fact:

**51%**

**of respondents are willing but don't know how to plan for retirement (65% for persons under age 30)**

**66%**

**believe that employers should provide financial professional help (74% for persons under age 30)**

The **Nationwide® Participant Engagement Program (PEP)** is designed to be an “always on” marketing and education source that helps you respond to employee needs by getting them engaged with your plan and, thus, driving retirement readiness. Here's how:



## Moments that matter by life stage

- We help participants throughout their retirement journey so they can make informed decisions to improve their retirement readiness and financial wellness
- Participant recordkeeping and behavioral data help us deliver a personalized experience unique to each participant, from relevant financial wellness content to driving their next best action



## Personalized campaigns

The Participant Engagement Program targets marketing that focuses on:

- Driving plan awareness and participation
- Improving financial health and wellness to inform confident decisions
- Increasing retirement readiness and driving positive financial action



## Successful, measurable results<sup>2</sup>

↑ **27%**  
Contributions

↑ **43%**  
Rolled-in assets

↑ **22%**  
Conversations held

↑ **22%**  
My Interactive Retirement Planner<sup>SM</sup> usage

You can rely on PEP to deliver the right message at the right time. It can help participants optimize their financial wellness in ways that also drive retirement readiness, so they can feel more confident about where they are on their retirement journey.



To learn about the Participant Engagement Program and how we drive successful outcomes, contact your Nationwide Retirement Specialist.

<sup>1</sup> 2021 Defined Contribution Plan Participant Survey Finding, J.P. Morgan Asset Management.

<sup>2</sup> Nationwide 2022 results across approximately 7,600 plans; increases are based on comparison with a control group.

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