Enhance your expertise and earn valuable credits

Continuing education programs from the Nationwide Retirement Institute® are designed to help you deepen your client relationships by being well-informed about the subjects they care about.

COLI: How businesses can use life insurance

Wednesday, July 13, 2 p.m. ET

In this course, we'll examine company-owned life insurance and company-sponsored, individually owned life insurance used to provide benefits to key executives. Get the edge when working with your business clients.

Credit hours: 1

Not approved in: NY

Intended for State Insurance and CFP®, CIMA®, CLU®, ChFC® credit

Helping clients prepare to age with dignity

Thursday, July 21, 2 p.m. ET

To succeed as a financial professional, you have to offer more than asset management. The Nationwide Retirement Institute® Aging with Dignity program can help you make an emotional connection with clients so you can build deeper trust as you help them provide the legacy they strive for. You can also develop relationships across multiple generations that could open the door to new business opportunities.

Credit hours: 1

Intended for CFP®, CRPS®, CIMA®, CLU®, ChFC®, CRPC® credit

Roth IRA conversion considerations

Thursday, July 28, 2 p.m. ET

This presentation highlights the benefits of having tax-diverse accounts to improve tax efficiency in retirement. Financial professionals can help clients identify opportunities to distribute savings between tax-deferred and tax-free accounts, which will give them more flexibility in retirement.

Credit hours: 1

Not approved in: CA, CO, NV, NJ, VA, WA

Intended for State Insurance and CFP®, CIMA®, CLU®, ChFC® credit

Register today using the QR codes above or online at **nationwidefinancial.com/CE**. Need assistance now? Contact the Nationwide Retirement Institute Planning Team by phone at **1-877-245-0763** or by email at **IPLNDESK@Nationwide.com**.

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