

Using life insurance strategically

How producers and policy holders stand to benefit

Life can be complicated. Clients of financial professionals rely on them for proactive strategies that can help navigate financial uncertainties that may increase as the clients get older.

At Nationwide, we've developed informative pieces that can help the producers you serve understand the vital role life insurance can play in well-devised financial plans.



The role of life insurance in a financial picture

Life insurance can be an important component of any well-diversified portfolio. When deciding how to invest, it's important your financial professionals and their clients understand the internal rate of return (IRR) and how it compares between life insurance products and other investments.

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Wealth transfer with Nationwide CareMatters® II

Discover how life insurance with Nationwide CareMatters® II may be used to help fund long-term care needs and still provide an inheritance for family members.

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Using life insurance as a retirement income supplement

While the Roth IRA is attractive, some Nationwide® indexed universal life (IUL) products offer a variety of features and benefits that may be used as a supplement to the Roth IRA. This case study illustrates how.

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Unraveling the self-insure myth - Why the affluent need LTC coverage

Affluent clients require a unique approach—one that involves the need to protect their financial portfolio against a potential market downturn by planning for long-term care costs. This white paper outlines how to have impactful discussions that can lead to successful outcome.

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Show clients the value of tax-free income in retirement

The insurance-based income solution (IBIS) is one of the simplest income tax mitigation strategies. An IBIS can help clients who are interested in having a liquid asset that grows tax-free and can provide tax-free income.

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How to use IRA distributions to fund Nationwide CareMatters II®

This sales idea explores a financial planning strategy that uses qualified assets to help cover long-term care costs, thereby protecting planned retirement income for clients who are 59½ years old and over.

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Find out more



See the difference that Nationwide can offer on your next case.
Call us today at 1-888-767-7373.



Nationwide®
is on your side

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