2023 LIMRA
ANNUAL
CONFERENCE
Forging the Future

# Seize the Opportunity: Closing the Life Insurance Protection Gap

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# The Financial Alliance for Racial Equity “FARE” Coalition

***Through this effort, we are uniting forces between financial services firms, historically black colleges and universities and industry partners to drive measurable change in the financial services industry.***

## FIRMS

- osaic
- Franklin Templeton
- Huntington
- M Financial Group
- Nationwide
- Swiss Re
- NFP
- RBC Wealth Management
- Capital Group

## HBCU'S

- WSSU Winston-Salem State
- VSU Virginia State
- Hampton University 1868
- Lincoln University Missouri
- 1867 Howard University
- Virginia Union University

## INDUSTRY PARTNERS

- The American College of Financial Services
- EBRI Employee Benefit Research Institute
- DCIIA Defined Contribution Institutional Investment Association
- CFP Board Center for Financial Planning
- Insured Retirement Institute
- American Retirement Association — Working for America's Retirement

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# NFP’s Investment in the Community

**Advancing diversity, equity, inclusion and belonging enhances our ability to:**

- **Deliver Meaningful value to clients**
- **Engage more clients and grow revenue**
- **Develop and retain employees**
- **Innovation and collaborate productively**
- **Positively impact communities around the world**
- **Establish a legacy to be proud of**

CEO | Commission for disability employment
Leading the way to an inclusive workforce

THE MDI KEEPER'S FUND

American Cancer Society®

MOVEMBER FOUNDATION

Children's Cancer Association
We Prescribe Joy

Make-A-Wish IRELAND

envision

TEENAGE CANCER TRUST

FARE
Financial Alliance for Racial Equity

100 BLACK MEN of Austin, Inc.

ellevate

wicc

World Central Kitchen

TEXAS EMPOWERMENT ACADEMY
SEAL OF KNOWLEDGE

yearup®

GenHERation®

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# Diverse & Underserved Markets

Visit **nationwidefinancial.com/nationwide-retirement-institute**

## We launched a Diverse & Underserved Markets thought leadership initiative to:

- Educate firms, partners and consumers about the unique financial and retirement income planning considerations of diverse and underserved customers
- Partner with firms and financial professionals to help them better engage and serve diverse and underserved market segments
- Access capabilities from strategic partners within our ecosystem

Current segments: **Women, Black, Hispanic, LGBTQ+, Rural, Asian American and Special Needs**

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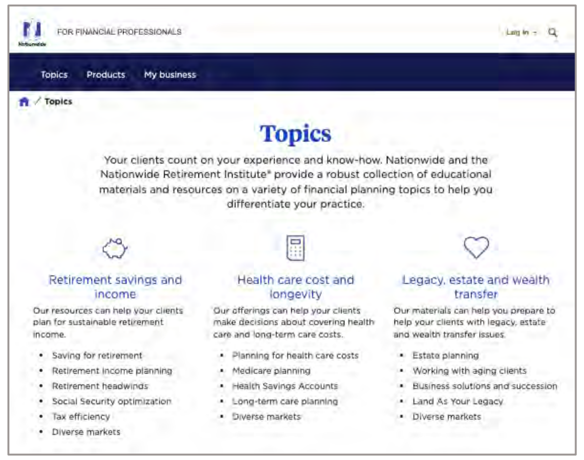
# Nationwide Tools & Resources


FOR FINANCIAL PROFESSIONALS

Log in

Topics Products My business

Topics

## Topics

Your clients count on your experience and know-how. Nationwide and the Nationwide Retirement Institute® provide a robust collection of educational materials and resources on a variety of financial planning topics to help you differentiate your practice.

**Retirement savings and income**

Our resources can help your clients plan for sustainable retirement income.

- Saving for retirement
- Retirement income planning
- Retirement headwinds
- Social Security optimization
- Tax efficiency
- Diverse markets

**Health care cost and longevity**

Our offerings can help your clients make decisions about covering health care and long-term care costs.

- Planning for health care costs
- Medicare planning
- Health Savings Accounts
- Long-term care planning
- Diverse markets

**Legacy, estate and wealth transfer**

Our materials can help you prepare to help your clients with legacy, estate and wealth transfer issues.

- Estate planning
- Working with aging clients
- Business solutions and succession
- Land As Your Legacy
- Diverse markets

## Nationwide Retirement Institute® (NRI)

Find articles, infographics and client-ready materials on topics such as, Health care, Medicare planning, Social Security, and more.

## NRI Resources

We're in your corner with tools, resources and support, helping you meet your clients' every need.

**Tools and calculators**

Our useful analyzers and customizable tools allow you to evaluate solutions and meet your clients' needs.

Explore illustrations

**Forms**

As a Nationwide-appointed financial professional, find relevant forms and applications.

Log in to access forms

**Continuing Education**

Enhance your expertise and earn valuable CE credits by attending our informative webinars.

See available courses

## NRI Topics

### Retirement savings and income

These resources can help you answer critical client questions such as “When should I file for benefits?” or “How can I optimize my income?”

### Health care cost and longevity

Our resources facilitate productive discussions that help your clients age with dignity and prepare for caregiving later in life.

### Legacy, estate and wealth transfer

Resources that give you opportunities to have necessary discussions with your clients regarding aging, wills, trusts and beneficiary designations.

## NRI Diverse Markets

Our Diverse Markets program is designed to help you better understand the potential differences and similarities among diverse client bases.

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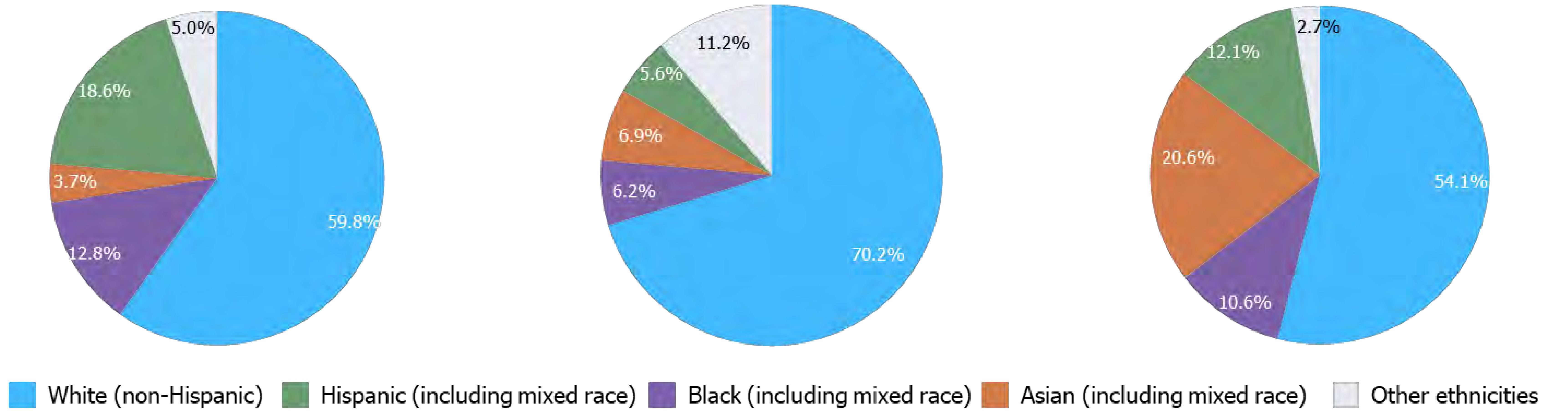
# New York Life: Multicultural Statistics

The U.S. population has become increasingly multicultural, and that trend is expected to continue through 2050

The U.S. Hispanic population will nearly triple from 47 million to 133 million by 2050

The U.S. Asian population will grow from 16 million to a projected 41 million over the same time period

U.S. Population* | Life Insurance Industry Agents* | New York Life Agents^




**US Census 2020

^2022 New York Life Roster

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# Sharing Our Experience

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# Sharing Our Experience

- List your organizations top three most successful programs to recruit and retain diverse Financial Professionals.
- What are the top three benefits resulting from your organizations investment in recruiting and retention programs?
- What do you believe has been the most successful strategy in selling to underserved markets?

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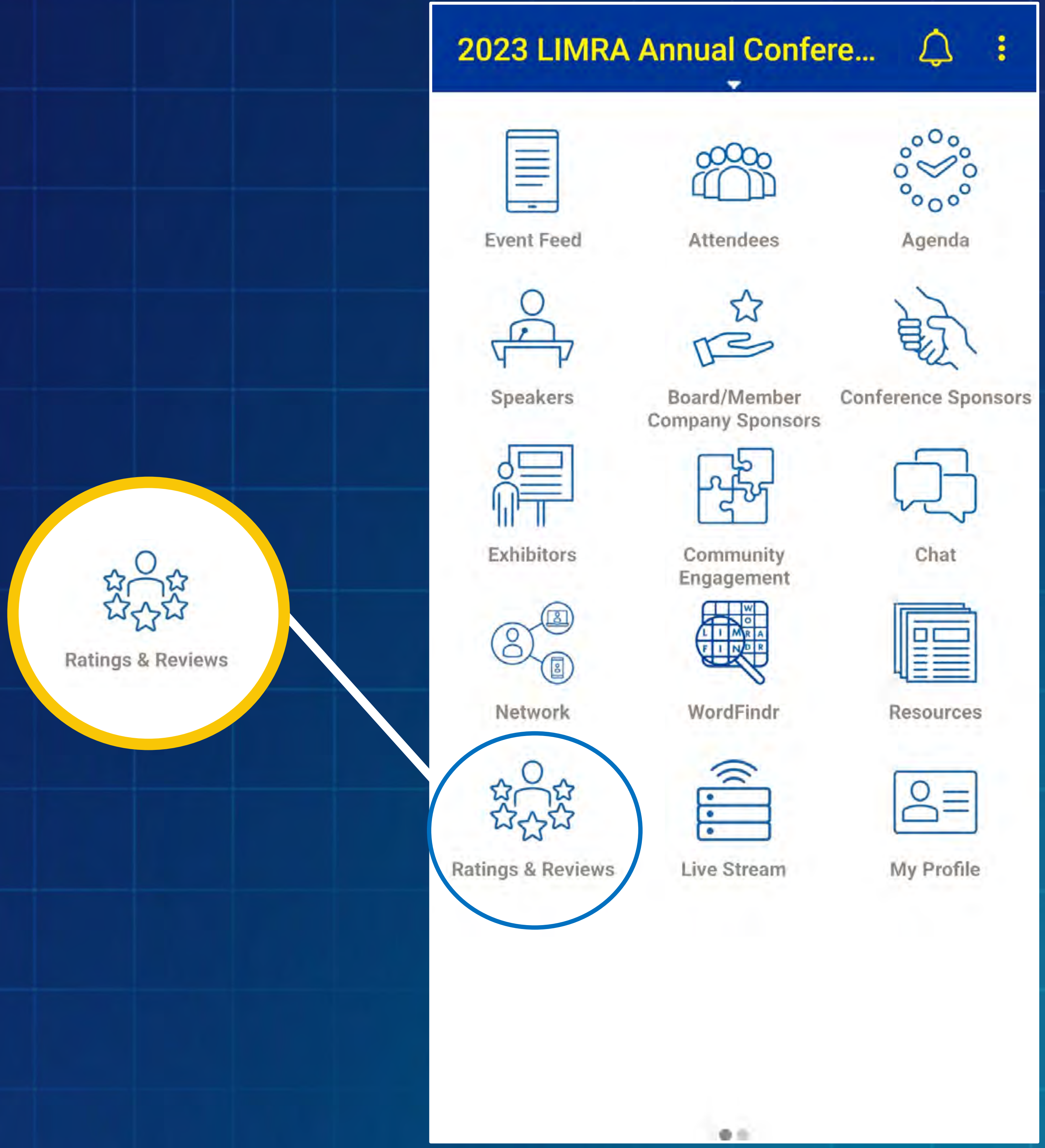
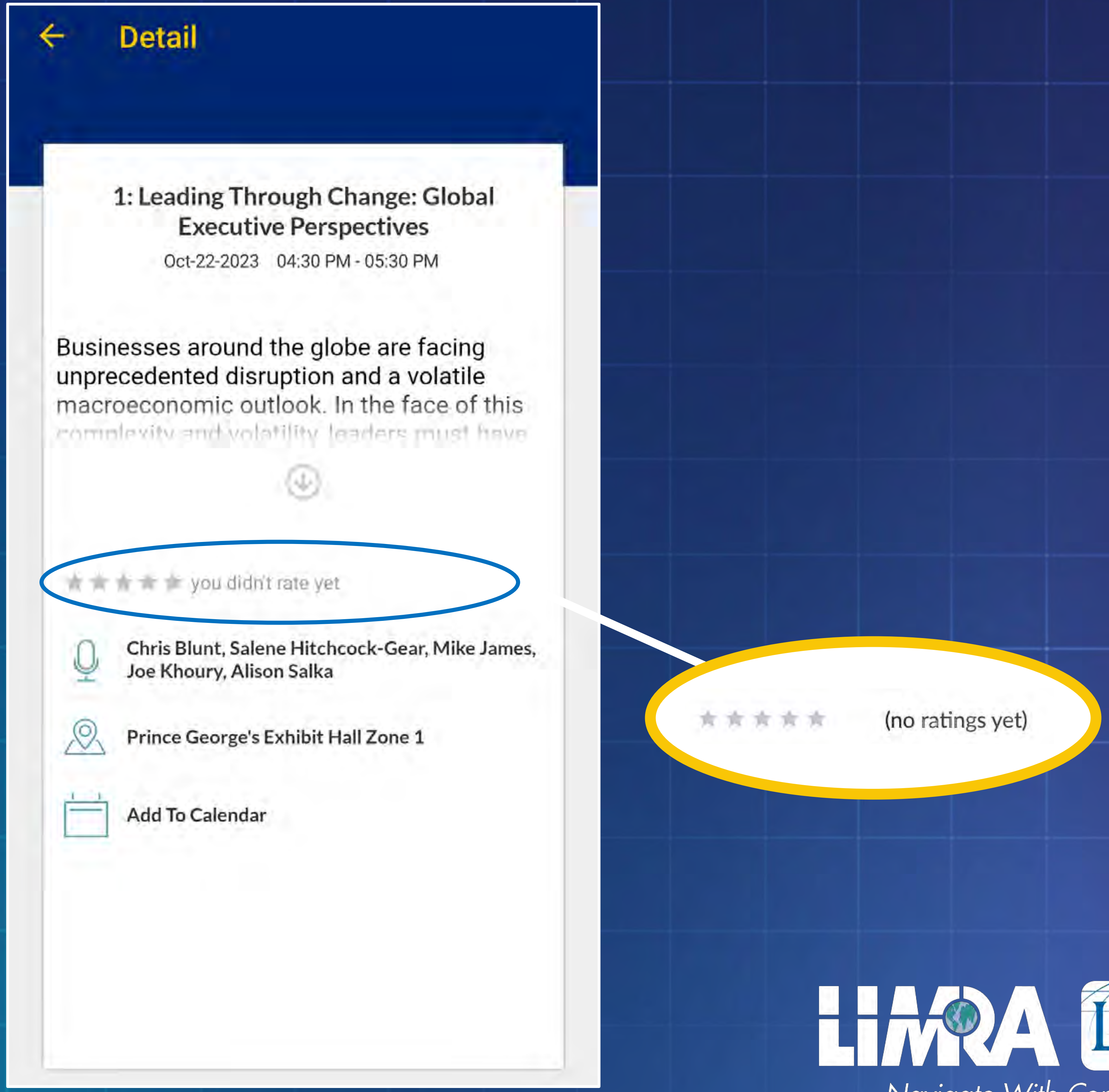
# Please Provide Your Feedback on the Conference App

## OPTION 1




## OPTION 2

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# Thank You

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NFM-23313AO (09/23)