nuveen
A TIAA Company

This program supports:

Client acquisition	Financial planning	Investor content

CE APPROVED
1 hour CFP, IWI and CPE for CPAs

Why Social Security matters:
And how to get the most out of it

Why participate in this program?

- Hundreds of financial professionals have leveraged Nuveen's Social Security expertise to strengthen relationships
- A clear understanding of Social Security benefits can be a powerful differentiator and referral tool
- Your clients and prospects might be entitled to benefits they don't know about

72%

Share of wallet for advisor firms that are the main source of retirement advice[1]

LEARNING OUTCOMES

Initiate conversations about Social Security with clients and prospects

Identify benefits available to the individual and family members

Evaluate a range of potential collection strategies

QUESTIONS ADDRESSED

When should my client start collecting?

Do they need to stop working first?

How can divorcés/widows collect more?

How long will Social Security remain solvent?

FORMAT

50-minute presentation, available live and on demand

Financial professional (FP) and investor versions available

One hour available CE credit for CFP and IWI, CPE credit for CPAs

It gives me a natural way to ask for client referrals.

Information that most pre-retirees don't know, but should.

I feel better positioned to be a one-stop shop for retirement planning.

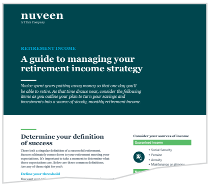
Summary

People often assume that the information on annual Social Security statements are all they need to know about their expected benefits. But statements provide a very limited view. In fact, most people don't realize the full impact of the choices they make or the alternatives available to them until it's too late. That knowledge gap represents a powerful opportunity for financial advisors.

By proactively sharing insight about this foundational component of retirement income – including the key considerations for a collection strategy that aligns with an individual's overall financial goals – advisors can engage new audiences and deepen relationships with existing clients.

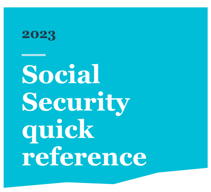
Additional resources

Appropriate for use with clients, these materials can support your retirement planning capabilities.

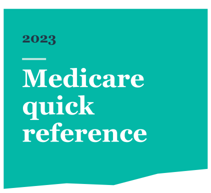


RETIREMENT INCOME GUIDE: Questions, examples and exercises to walk investors step by step through the process of establishing a sound retirement income strategy

ACTIONABLE ARTICLES focused on how financial professionals can leverage Social Security to acquire and engage clients, create referrals, and enhance their practice



SOCIAL SECURITY QUICK REFERENCE summarizes important Social Security concepts, current tax rates and benefit amounts



MEDICARE QUICK REFERENCE summarizes rules and costs for Medicare Parts A-D and Medigap

ADVISOR EDUCATION SPECIALIST

Robert Kron, CFP
Managing Director

Rob develops and delivers educational programs to help financial professionals grow their businesses. Rob joined Nuveen in 2020 with more than 30 years of experience in the financial services industry. His areas of expertise include financial planning, advisor practice management, Social Security and investor education. In addition to presenting virtually and in person to audiences of all sizes, Rob has appeared in various print and broadcast media, including CNBC, Fox Business, Bloomberg, and Advisor TV, the Wall Street Journal and USA Today.

Contact your Nuveen Advisor Consultant today at 800.221.9271 for more information.

About Nuveen Advisor Education

Nuveen brings our financial professional partners – and their valued clients – an experienced group of subject matter experts ready to share ideas, insights and educational programs. Whether it's a focus on enhancing an advisor's practice, acquiring new clients or current, actionable market and asset class insights, Nuveen offers timely and relevant content and programs.

We look forward to partnering with you.

IMCA 2022 STAR AWARDS WINNER OVERALL ADVISOR EDUCATION

1 Source: NAPA, Oct. 13, 2021.

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