

## Ready or not: *Here comes lifetime income*

### Program summary

Defined contribution is becoming a tale of two retirement plans: one focused on savings vs. one focused on retirement outcomes, specifically lifetime income.

This session examines why participant outcomes and lifetime income are now a critical focus, how it translates into strategic plan design and ways DC plan advisors can incorporate it into their value propositions.

### Suitable for financial professionals who want to:

- Learn what's driving the accelerating shift toward lifetime income across the industry, especially post pandemic
- Understand what steps plan fiduciaries should take to evaluate income solution

### Key benefits:

- Nuveen's research on why plan sponsors are thinking about plan design differently than in prior years, and how it's changing their priorities
- Determine what role DC plan advisors and consultants are expected to play in these shifting marketing conditions
- Realize the potential benefits to a DC plan advisors' value propositions

### Curriculum components



#### Presentation

- This CE-eligible presentation examines how the shift to lifetime income can be utilized to help DC plan advisors enhance their retirement business



#### Roadmap to retirement income

- Review the different lifetime income solutions available to plan fiduciaries
- Compare lifetime income solutions key features and benefits
- Assess general best practices for plan integration



#### Workbook

- Help DC plan advisors objectively assess their practices and define value propositions
- Determine service model gaps relative to industry innovations
- Identify opportunities for expansion and efficiencies



#### Whitepaper

- Outlines what plan fiduciaries need to know about providing lifetime income within a 401(k) plan.



#### Investment Policy Statement (IPS)

- Sample IPS language written by third party expert ERISA counsel for adding an in-plan annuity into a 401(k) plan

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

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