



# How to access your account

# Congratulations!

Thank you for choosing a Nationwide® annuity for your retirement needs. Let's get you step-up to access your account anytime, anywhere.

Use this step-by-step guide to set up online access to your new online account at [nationwide.com/annuities](https://nationwide.com/annuities)

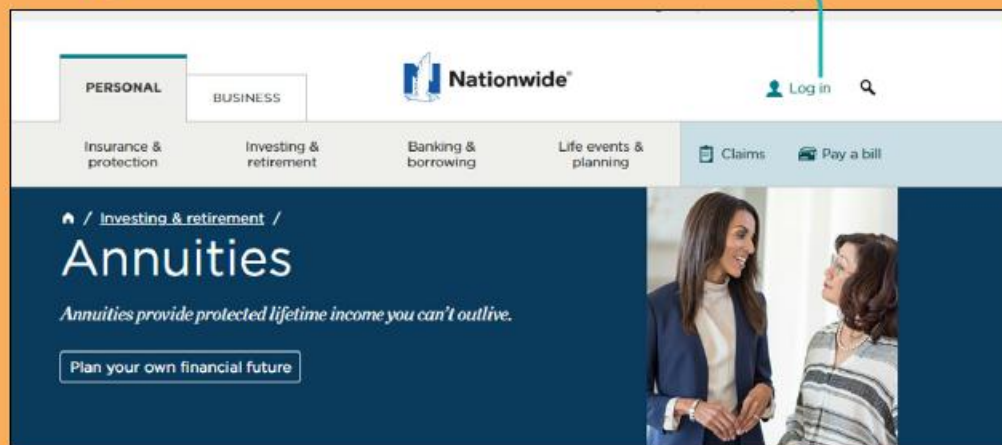
Through this online access to your account, you you can sign-up for electronic Delivery, review your investment selections, manage your allocations and get important news about your annuity.

Let's set up your account!

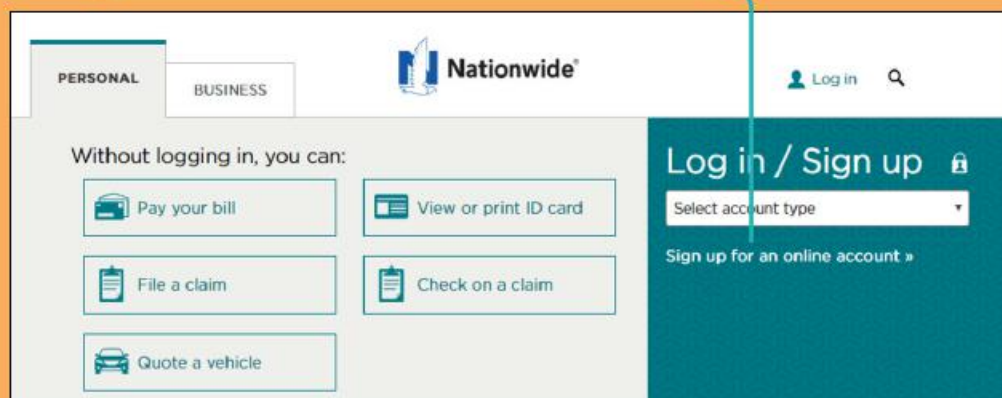


# STEPS:

1 Go to: [nationwide.com/annuities](https://nationwide.com/annuities)



2 Under the login boxes, select: Sign up



3 Choose the account access type: Investing, then select Sign up





# STEPS:

## 4 Verify your information

On the “Sign up for Online Access” screen, fill out your first name, last name, date of birth, Zip code and email address or phone number.

The screenshot shows the Nationwide 'SIGN UP FOR ONLINE ACCESS' screen. At the top, there's a 'Contact Us' button. Below the title, a progress bar indicates 'Step 1 of 6: Enter Personal Information'. A message states: 'We'll need to look you up in our records to verify your identity and protect your privacy and security. Note: If we're unable to find your details, you'll be able to enter the account, policy or contract number listed on your statement.' Below this, a question asks 'What kind of account are you registering for?' with two radio button options: 'Individual Insurance' (selected) and 'Manager of a trust/estate/corporate asset'. A 'secure transaction' icon is visible. The 'Member Information' section contains several required fields: 'First name', 'Last name', 'Suffix', 'Date of birth' (with a date picker), 'Zip code', and 'Enter phone number or email address'. There are 'Phone' and 'Email' buttons. Below these is an 'Email address' field with a 'secure' icon. At the bottom, there are 'Cancel' and 'Continue' buttons. A 'Up next: Verify identity' message is also present.

## 5 Once completed, select Continue

## 6 Enter: contract/policy number(s) (You can find this number in your contract package)

This screenshot shows the same Nationwide 'SIGN UP FOR ONLINE ACCESS' screen, but with an error message: 'We were unable to find a match for the information you provided. Please provide us with additional information below to verify your identity or enter your personal information again.' Below the message is an 'Additional Information' section with a 'secure transaction' icon. It contains a required field for 'Account/Policy/Contract number' and a note: 'Please enter your account, policy or contract number exactly as it appears on your statement.' Below this is a text input field with a placeholder: 'Member of a group retirement plan? Enter your case number including the dash (ex. 123-12345)'. There is also a 'Reenter Your Personal Information' button. At the bottom, there are 'Cancel' and 'Continue' buttons. A 'Up next: Verify identity' message is also present.

### HELPFUL TIP

Make sure you add the dash in your account/policy number. It should read XX-XXXXXXX rather than XXXXXXXXX

## 7 Once completed, select Continue

The questions on this page will be unique to you and are in no way tied to the contract directly. These questions are designed to be unique, to protect the security of your on-line account. Please answer them, then click **Continue**.

## 8 Identity Verification

### STEPS:

The screenshot shows the Nationwide 'SIGN UP FOR ONLINE ACCESS' page. It is 'Step 2 of 4: Verify Your Identity'. The page title is 'Identity Verification' with a '\* Required fields' indicator. A security notice states: 'To protect the security of your online account, Nationwide partners with companies to verify personal information and confirm your identity. Please answer the following questions, which we do not store or share with anyone.' The first question is: '\* From the following list, select one of your current or previous employers.' with radio button options: 'None', 'Frog', 'Nationwide Insurance', 'McDonalds', and 'None of the above'. The second question is: '\* In which subdivision is your home located on Bellecrest Ct?' with radio button options: 'Martino Landing', 'The Lakes At White Oak', 'Brookridge', 'Sawyer Chase', and 'None of the above'. The third question is: '\* Which zip code has ever been a part of your address?' with radio button options: '43353', '43215', '43350', '43816', and 'None of the above'. The fourth question is: '\* Which of the following people lives in Jackson?' with radio button options: 'Marcus Smith', 'Bryan Smith', 'Shane Smith', 'Wesley Smith', and 'None of the above'. At the bottom right, it says 'Up next: Complete Profile' and has a blue 'Continue' button.

9 Once completed, select **Continue**

# STEPS:

## 10 Create your **username** and **password**.

Be sure to check the **Electronic Services Agreement** box.

Once you've created your own username and confirmed your password, please scroll down.

**Nationwide** Contact Us

**SIGN UP FOR ONLINE ACCESS**

**Step 3 of 6: Username & Password Creation**

**Username and Password** Secure transaction \* Required

Tip: Using your email address as your username will make it easier to remember.

Create username <sup>\*</sup>  Check availability

Your username is not case sensitive. It must:

- Be 8 or more characters
- Not exceed maximum of 30 characters
- Not have spaces or special characters
- Not include these characters: ", &, !, %, ^, ~, ' ( ), or \

Create password <sup>\*</sup>

Your password is case sensitive. It must:

- Be 8 or more characters
- Not have spaces
- Have at least 1 number or 1 special character
- Not contain all numbers or these special characters: ", &, !, %, ^, ~, ' ( ), or \

Confirm password <sup>\*</sup>

Create an eMail account PW ☐

Nationwide PW is an optional security measure used to verify sensitive information on Account Alert. The approach is via, Account, and Networked Phone.

**Electronic Services Agreement**

☐ Check that you have read and accept the Electronic Services Agreement <sup>\*</sup>

Next: Contact Information

**Continue**

Once completed, **11** select **Continue**

## 12 Create: Contact Information

To further protect your information with our enhanced security features, please re-enter your email address or phone number.

**Nationwide** Contact Us

**SIGN UP FOR ONLINE ACCESS**

**Step 4 of 6: Contact Information**

**Protect your information with our enhanced security.**

Please complete the information below, and the next time you sign in from a device we don't remember, we'll email or text you a temporary confirmation code for account access (in order to verify you). We'll also use this same information if you ever need to retrieve your username or password or want to receive other information electronically.

**Contact Information** Secure transaction \* Required

Email address <sup>\*</sup>

Confirm email address <sup>\*</sup>

Mobile phone number

By providing your cell phone number and consenting to the next screen, you consent to receiving text message confirmation codes from Nationwide and verify that you are the account holder or have the account holder's permission. Message and data rates may apply.

**Remember This Computer or Device**

By having Nationwide remember a set-up computer or device, you will minimize the number of security challenges you encounter at log-in. We are able to remember multiple computers and devices.

Would you like us to remember this device? <sup>\*</sup>

☐ Yes. This is a private or secure device for accessing my Nationwide account

☐ No. This is a public or shared device

Next: Confirmation

**Back** **Create account**

Click: Create Account **13**

# STEPS:

- 14 Registration is almost complete.  
Click continue to view your account.

The screenshot shows the Nationwide website's registration completion page. At the top, the Nationwide logo is on the left and a 'Contact Us' link is on the right. Below the logo, the text 'REGISTRATION COMPLETE' is displayed. A progress bar indicates 'Step 4 of 6: Confirmation' is complete. A green checkmark icon is followed by the message: 'Success! Thank you for setting up online access, Charles.' Below this, a section titled 'Registration Complete' contains the text: 'You now have 24/7 access to your account online. Username: cbiggs46'. It then asks 'Let us know how you would like to receive your billing statements, policy documents and account updates.' with a 'Set preferences' button. A 'Member Services' section lists four options: 'Bills & Payments' (with a dollar sign icon), 'Account Management' (with a laptop icon), 'Your Profile' (with a person icon), and 'Documents' (with a document icon). Each option has a brief description of services. At the bottom right, it says 'Next: Set Your Preferences' and a 'Continue' button. The footer contains the Nationwide logo and three support lines: Insurance Tech Support (1-877-304-1065), Annuity & Life Tech Support (1-888-867-5173), and Retirement Plans Tech Support (1-800-772-2182).

Nationwide® [Contact Us](#)

REGISTRATION COMPLETE

Step 4 of 6: Confirmation

Success! Thank you for setting up online access, Charles.

**Registration Complete**

You now have 24/7 access to your account online.  
Username: cbiggs46

Let us know how you would like to receive your billing statements, policy documents and account updates.

[Set preferences](#)

**Member Services**

- Bills & Payments**  
Make a payment or view statements. Set up your payment method online. Sign up for Automatic Payments (Easy Pay). View current and past statements.
- Account Management**  
Service your account quickly and easily. Update drivers and vehicles. Request changes to your coverages. Update your contact information. Report or check the status of your claim.
- Your Profile**  
Update your profile and preferences. Reset your security questions and password. Make sure your contact and applicable paperless preferences are current.
- Documents**  
Keep your paperwork organized in one place. Print your proof of insurance card. Review statements, bills and notices. Review, verify or print your policy or other important policy documents.

Next: Set Your Preferences

[Continue](#)

Nationwide® Insurance Tech Support: 1-877-304-1065 Annuity & Life Tech Support: 1-888-867-5173 Retirement Plans Tech Support: 1-800-772-2182

# Congratulations!

## You now have online access

Now that you have online access to your account, a world of possibilities is open to you.

You can use this site to:

- Check your balance and personal rate of return
- Reallocate your balance
- View statements and have immediate access to tax documents
- Go Green! Sign-up for electronic Delivery to receive notification of your statements and tax documents immediately

And much more!

## Check it out today!

**Have problems navigating the site?**



**Call us at 1-800-848-6331.**



**Nationwide<sup>®</sup>**  
is on your side

• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution • Not insured by any federal government agency • May lose value