

Nationwide Enrollment Book Checklist

Client Name: _____

Case ID #: 871 - (not required)

Number of Enrollment Books Shipped to:

- Plan Sponsor [please list # of books to specific locations (if applicable)]:

- Investment Professional # of books: _____
(Regardless of where books are shipped, Investment Professionals will receive one)

Enrollment Folders (available upon request from Nationwide)

- Yes, please ship to Plan Sponsor
- Yes, please ship to Investment Professional
- No thanks

Meeting Date: _____ (required)

Please Fax to Hollie Sanchez at 405-478-4015
or email at hsanchez@pension-solutions.net