Northwestern Mutual Sees Record Inflows into New Active/Passive Investment Solutions as Clients Seek Lower Costs, Dynamic Asset Allocation

Northwestern Mutual client investment assets under management surpass $100 billion and wealth management business shows strong momentum as 2017 gets underway

MILWAUKEE, Feb. 7, 2017 /PRNewswire/ -- Northwestern Mutual announced today that the company's Signature Portfolios Active/Passive models, first introduced in early 2016, have surpassed $2 billion in assets through the end of 2016. This reflects investor demand for lower investment management costs, as well as a combination of active and passive strategies that can dynamically navigate today's investing environment. The models, which are offered by Northwestern Mutual Wealth Management Company, use both actively managed mutual funds and passively managed ETFs in an overall portfolio, with the goal of providing investors with competitive, risk-adjusted returns over the long term.

"The decision to use active or passive solutions is considered by many in the investment world as an either-or proposition; an investor is either in the 'active' or 'passive' camp. We believe each can add value to an overall portfolio when used as part of a disciplined investment process," said Christian Mitchell, president, Northwestern Mutual Wealth Management Company. "The dramatic growth in these models is testament to the fact that for many investors, while cost is an important factor, they are also looking for an optimal combination of strategies for meeting their personal financial goals over the long-term."

The active/passive models employ a dynamic asset-allocation selection overlay to provide "measured tilts" from the static long-term strategic asset allocation, based on the intermediate-term attractiveness of an asset class. Each tilt is evaluated in the context of the overall portfolio's risk and return characteristics by Northwestern Mutual's team of investment professionals and portfolio managers, led by Chief Investment Strategist, Brent Schutte. Schutte's regularly updated market perspectives are available here.

The growing use of the active/passive models is in concert with the overall growth of Northwestern Mutual's retail investment products and services, offered through Northwestern Mutual Investment Services and Northwestern Mutual Wealth Management Company, which as of December 31, 2016 reached $100 billion in assets under management. Northwestern Mutual Investment Services has been consistently ranked among the top 10 independent broker-dealers, as measured by total revenues, by leading investment industry publications.[i]

"This is an exciting milestone for our business, because behind this number is the fact that we have more than 7,000 financial professionals who are working day-to-day with individuals and families to create and manage personalized financial plans – and more and more of these financial professionals are building investment plans for their clients to help them grow, preserve and protect their wealth," said Mitchell.

According to Northwestern Mutual's 2016 Planning & Progress Study, the majority of Americans report that integrating solutions that both grow and protect their assets is one of the most important factors in achieving their financial security.

Through its subsidiaries, Northwestern Mutual Investment Services and Northwestern Mutual Wealth Management Company, Northwestern Mutual provides individuals with a variety of investment products and services to help people with financial protection, wealth accumulation and estate preservation and distribution. These solutions include brokerage and advisory services, trust services and discretionary portfolio management for high-net-worth individuals.

About Northwestern Mutual
Northwestern Mutual has been helping families and businesses achieve financial security for nearly 160 years. Our financial representatives build relationships with clients through a distinctive planning approach that integrates risk management with wealth accumulation, preservation and distribution. With $238.5 billion in assets, $27.9 billion in revenues and more than $1.6 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to more than 4.4 million people who rely on us for insurance and investment solutions, including life, disability income and long-term care insurance; annuities; trust services; mutual funds; and investment advisory products and services. Northwestern Mutual ranks 100 on the 2016 FORTUNE 500, and is recognized by FORTUNE as one of the "World's Most Admired" life insurance companies in 2016.

Northwestern Mutual is the marketing name for The Northwestern Mutual Life Insurance Company,Milwaukee, WI, and its subsidiaries. Northwestern Mutual and its subsidiaries offer a comprehensive approach to financial security solutions including: life insurance, long-term care insurance, disability income insurance, annuities, life insurance with long-term care benefits, investment products, and advisory products and services. Subsidiaries include **Northwestern Mutual Investment Services, LLC** (NMIS), broker-dealer, registered investment adviser, member FINRA and SIPC; the Northwestern Mutual Wealth Management Company (NMWMC), federal savings bank; and Northwestern Long Term Care Insurance Company (NLTC).

[i] *Financial Advisor*, April 2016; *Financial Planning*, June 2016; and *Investment Advisor*, June 2016.

SOURCE Northwestern Mutual

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