

## 10 Northwestern Mutual Advisors Named Among Nation's Best in Latest Barron's Ranking

MILWAUKEE, March 14, 2022 /PRNewswire/ -- Northwestern Mutual announced today that 10 financial advisors affiliated with its wealth management company are among the industry's finest, according to *Barron's* annual ranking of the nation's top wealth professionals.

"These elite advisors and their teams are the best of the best when it comes to wealth management and guiding clients throughout their financial planning journey," said Aditi Javeri Gokhale, chief strategy officer, president of retail investments and head of institutional investments at Northwestern Mutual. "We're honored to have these deeply trusted and highly talented professionals helping our clients grown their wealth while also protecting everything they've worked so hard for."

Those recognized include:

Michael Erpelding, [Erpelding Wealth Management](#), Edina, Minn.  
Tim Harrison, [Harrison Financial Services](#), Omaha, Neb.  
Matthew Heckmann, [Heckmann Financial](#), Middleton, Wis.  
Matthew Lytell, [Riverwalk Wealth Advisors](#), Tampa, Fla.  
[Ryan B. Smith](#), Atlanta, Ga.  
Scott Sparks, [Sparks Financial](#), Denver, Colo.  
George Starnes, [G3 Wealth Advisors](#), Colombia, S.C.  
Nolan Stokes, [Two Lights Private Wealth](#), Fairfax, Va.  
Scott Underwood, [Socium Advisors](#), St. Louis, Mo.  
Matthew Wunder, [Wunder Financial](#), Westport, Conn.

The *Barron's* Top 1,200 Financial Advisors ranking serves as an industry scorecard, as well as a starting point for clients looking for an advisor. *Barron's* evaluates quantitative factors such as assets and revenue, along with qualitative factors including the advisors' experience, their advanced degrees and industry designations, charitable contributions, and the size, shape and diversity of their teams.

Driven by the efforts of Northwestern Mutual's advisors, the *Barron's* distinction follows a year of record-setting business results at the company. Northwestern Mutual announced record revenue (\$34 billion) and surplus (\$37 billion), as well as the largest-ever dividend payout (\$6.5 billion). Additionally, Northwestern Mutual Investment Services was ranked the fifth largest independent broker-dealer (IBD) by total revenue by *InvestmentNews* and the seventh largest by *Financial Advisor*. One hundred Northwestern Mutual Wealth Management advisors were recognized on industry lists, including *Forbes'* America's Top Financial Security Professionals, *Forbes'* Top Next-Gen Wealth Advisors and *Barron's* 2021 Top 100 Women Financial Advisors ranking.

Northwestern Mutual Investment Services and Northwestern Mutual Wealth Management Company, which are subsidiaries of Northwestern Mutual, provide a variety of investment products and services to help clients 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 the *Barron's* Top 1,200 Financial Advisors List

The *Barron's* Top 1,200 names the top advisors in each state, with the number of ranking spots determined by each state's population and wealth. Rankings are based on assets under management, revenue generated by advisors for their firms, the quality of the advisors' practices, regulatory record, philanthropic work, and 100-plus points of data provided by the advisors themselves. Neither the brokerages nor the advisors pay a fee to *Barron's* in exchange for inclusion in the *Barron's* Top 1,200.

### About Northwestern Mutual

Northwestern Mutual has been helping people and businesses achieve financial security for more than 160 years. Through a holistic planning approach, Northwestern Mutual combines the expertise of its financial professionals with a personalized digital experience and industry-leading products to help its clients plan for what's most important. With more than \$334 billion in total assets, \$34 billion in revenues, and \$2.1 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to more than 4.9 million people with life, disability income and long-term care insurance, annuities, and brokerage and

advisory services. The company manages more than \$244 billion of investments owned by its clients and held or managed through its wealth management and investment services businesses. Northwestern Mutual ranks 90 on the 2021 FORTUNE 500 and is recognized by FORTUNE® as one of the "World's Most Admired" life insurance companies in 2022.

Northwestern Mutual is the marketing name for The Northwestern Mutual Life Insurance Company (NM), Milwaukee, WI (life and disability insurance, annuities, and life insurance with long-term care benefits) and its subsidiaries. Subsidiaries include Northwestern Mutual Investment Services, LLC (NMIS) (investment brokerage services), broker-dealer, registered investment adviser, member FINRA and SIPC; the Northwestern Mutual Wealth Management Company® (NMWMC) (investment advisory and services), federal savings bank; and Northwestern Long Term Care Insurance Company (NLTC) (long-term care insurance). Not all Northwestern Mutual representatives are advisors. Only those representatives with "Advisor" in their title or who otherwise disclose their status as an advisor of NMWMC are credentialed as NMWMC representatives to provide investment advisory services.

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