Northwestern Mutual Expands Suite of ESG Investment Portfolios

New high-net-worth portfolio options provide ESG solutions across Northwestern Mutual's advised investment offerings

MILWAUKEE, May 10, 2022 /PRNewswire/ -- Northwestern Mutual today announced it has expanded its Environmental, Social and Governance (ESG) investment portfolios with new options for high-net-worth investors in its Private Client Services and Signature Managed Accounts programs. The portfolios, offered by Northwestern Mutual Wealth Management Company and available exclusively through Northwestern Mutual advisors, provide access to a diverse mix of asset classes with ESG considerations incorporated throughout the portfolio.

"More and more investors are seeking out investment strategies that reflect their personal values while also achieving their long-term financial goals," said Jeb Bentley, Northwestern Mutual Wealth Management Company President and CEO. "We have seen increasing interest in ESG among our own client base and are pleased to now offer a range of professionally managed, ESG-aligned options that are sure to resonate with investors."

Northwestern Mutual also introduced ESG Active/Passive models in the company's Signature Portfolios, its mutual fund and ETF model portfolio program, at the end of 2021. These model portfolios integrate ESG into the investment process and combine active management with low-cost passive funds for investors with a range of risk tolerances. The models have already attracted more than $70 million in assets under management since launch.

Northwestern Mutual has seen rapid growth and increasing recognition for its investment offerings in recent years. It recently ranked third in the J.D. Power 2022 U.S. Full Services Investor Satisfaction Study, which measures overall investor satisfaction with full-service investment firms across a variety of factors, including trust, people and products and services. Northwestern Mutual's retail assets under management have nearly doubled over the last five years and now stands at more than $237 billion as of March 31, 2022, following record cash flows in 2021. Northwestern Mutual continues to be one of the top 10 independent broker-dealers by revenue – and among the fastest growing – in the United States. The company's financial advisors have seen a strong showing in recent industry rankings, with nearly 140 recognitions on top advisor lists from *Forbes* and *Barron's* this year alone. Additionally, Northwestern Mutual's proprietary financial planning platform – PX – was named "Best InsurTech Solution" at the 2022 FinTech Breakthrough Awards.

"In the last few years, we have significantly expanded our investment capabilities and offerings to become a major player in comprehensive financial planning," said Bentley. "With our exclusive insurance and investment offerings, Northwestern Mutual advisors are in a unique position to help clients achieve their individual goals and dreams – and most importantly, greater financial security."

About Northwestern Mutual
Northwestern Mutual has been helping people and businesses achieve financial security for more than 165 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 $570 billion in combined company and client assets, $34 billion in revenues, and $2.1 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to nearly five million people with life, disability income and long-term care insurance, annuities, and brokerage and advisory services. Northwestern Mutual ranked 90 on the 2021 FORTUNE 500 and was 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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