Northwestern Mutual Earns Best-Ever Showing on National Ranking of "Top Next-Gen Wealth Advisors"

Company's honorees are an average of 15 years younger than their industry peers

MILWAUKEE, Aug. 3, 2022 /PRNewswire/ -- Northwestern Mutual wealth professionals earned 18 of the coveted spots – more than ever before – on *Forbes'* 2022 list of "Top Next-Gen Wealth Advisors." Not only did the company expand its presence on this year's national ranking, but its advisors were also more than 15 years younger than their U.S. industry peers on average.

The *Forbes* "Top Next-Gen Wealth Advisors" ranking recognizes leading wealth professionals who are age 40 or younger with at least four years of industry experience. Advisors are evaluated according to a variety of performance-based criteria covering assets under management, revenue generated and modeling industry best practices.

"I'm incredibly proud of Northwestern Mutual's diverse, talented and trusted force of wealth advisors who are committed to making a lasting impact on the lives of the clients they so proudly serve," said Aditi Javeri Gokhale, the chief strategy officer, president of retail investments and head of institutional investments at Northwestern Mutual. "As we enter the largest intergenerational wealth transfer in history, more Americans are relying on the guidance of financial experts. Northwestern Mutual's presence in this year's Next-Gen rankings further demonstrates our ability to support the evolving needs of this next generation of clients."

Those recognized as *Forbes* "Top Next-Gen Wealth Advisors" include:

Joseph Anderson, The Anderson Financial Group, Saratoga Springs, N.Y.
Mark Anderson, Anderson Wealth Management, Colorado Springs, Colo.
Douglas Benson Jr, Benson Wealth Management, Ankeny, Iowa
David Eisenhauer, Tailwinds Wealth Management and Insurance Solutions, Walnut Creek, Calif.
Barry Fies, Myklebust, Horne & Fies Financial Group, Mequon, Wis.
Jacqueline Fish, LifeWorth Financial, Charlotte, N.C.
Merrill Gagne, Gagne Wealth Management Group, Greenfield, Mass.
David Girola, DeRouen, Girola & Associates, Lake Charles, La.
Matthew Kubicek, Enduring Wealth Group, Baton Rouge, La.
Mark Kull, Capitalis Planning Partners, Louisville, Ky.
Tyler Layne, Layne Financial, Twin Falls, Idaho
Whit Newton, Luca Partners, Raleigh, N.C.
Alap Patel, Chicago, Ill.
Robert Roy, RMG Wealth Management Group, Wilbraham, Mass.
Ryan Saunders, Plancentric Financial Group, Charlotte, N.C.
Darren Trautmann, Emerald Wealth Management, Bellevue, Wash.
Neil Van Dam, Van Dam Financial Group, Fargo, N.D.
Andrew Watkins, Triangle Wealth Advisors, Durham, N.C.

Northwestern Mutual Investment Services and Northwestern Mutual Wealth Management Company, which are subsidiaries of Northwestern Mutual, offer 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.

The pandemic inspired Gen Y and Z to plan, but uniquely, Northwestern Mutual is reaching out to them

The COVID-19 pandemic and the economic turmoil that it created inspired many young professionals to make some changes in how they plan, spend and save money. They started saving more, paying down debt, investing, cut back on spending, and showed renewed interest in life insurance.

Despite this seismic shift in planning attitudes among Gen Y and Z, relatively few financial services companies are strategically positioned to engage these potential new customers. But Northwestern Mutual is. The company is intentional about thoughtfully engaging prospective clients when they are younger and emerging in their careers. In fact, the average age of a Northwestern Mutual financial expert is 39, over 15 years younger than the U.S. industry average of 55, according to J.D. Power.

On average, Northwestern Mutual's customers become clients at the age of 32, far younger than the rest of the industry – especially among those who go beyond the transactional offering of a debit or credit card, or a one-time investment purchase, instead offering long-term financial planning and wealth management advice.

In addition to being younger, the company's financial experts have more credentials than most others in the financial services industry. This combination of youth, relevance, capability and expertise enables the company's advisors to create long-term relationships with clients that bridge 20, 30, and even 40 years.

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 $560 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 97 on the 2022 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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