

11 Northwestern Mutual Advisors Named Among Nation's Best in New Barron's Ranking

MILWAUKEE, March 13, 2023 /PRNewswire/ -- One of the country's premier financial news publications has named 11 Northwestern Mutual-affiliated advisors – to its list of the nation's top wealth professionals.

"Northwestern Mutual's comprehensive approach to financial planning is proven to deliver better financial results over the long-term, and our advisors are the best of the best in offering it," said **Aditi Javeri Gokhale**, the company's chief strategy officer, president of retail investments and head of institutional investments. "As uncertainty clouds our economic future, we're proud of our elite advisors and their teams, and all they do to provide sophisticated advice to help clients protect what they've already built while creating long-term prosperity."

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

The Northwestern Mutual advisors recognized on this *Barron's* ranking include:

Jerry David, Prescient Financial Solutions, Milwaukee, WI
Michael Erpelding, Erpelding Wealth Management, Edina, MN
Tim Harrison, Harrison Financial Services, Omaha, NE
Matthew Heckmann, Heckmann Financial, Middleton, WI
Matthew Lytell, Riverwalk Wealth Advisors, Tampa, FL
Ryan B. Smith, Smith Capital Advisors, Atlanta, GA
Scott Sparks, Sparks Financial, Denver, CO
George Starnes III, G3 Wealth Advisors, Columbia, SC
Nolan Stokes, Two Lights Private Wealth, Fairfax, VA
Scott Underwood, Socium Advisors, St. Louis, MO
Matthew Wunder, Wunder Financial, Westport, CT

"With an unwavering dedication to delivering exceptional service and superior outcomes to the clients they proudly serve, these Northwestern Mutual advisors truly stand out in the industry," said Tim Gerend, chief distribution officer, Northwestern Mutual. "Our clients, our company and our industry are so fortunate to have these mission-driven financial professionals providing trusted advice so that people can live their best lives today and in the years to come."

Along with delivering for their clients, these Northwestern Mutual advisors – and thousands more nationwide – were core to driving the company's outstanding 2022 business results. Last month, Northwestern Mutual [announced a record number of total clients](#) (more than five million), full-time financial professionals (nearly 8,000), revenue (\$35 billion), surplus (\$37 billion) and permanent life insurance sales. Additionally, in 2022 Northwestern Mutual Investment Services was ranked the sixth largest independent broker-dealer by total revenue by *InvestmentNews* and the seventh largest by *Financial Advisor*.

Northwestern Mutual is a leading provider of wealth management and investment solutions – with a growing number of clients turning to the company's financial advisors to help them protect and grow their wealth. The company's broad range of investment options, combined with its industry-leading risk protection solutions, gives clients the ability to achieve better long-term financial outcomes.

No investment strategy can guarantee a profit or protect against a loss.

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, 100-plus points of data provided by the advisors themselves and other criteria. Neither the brokerages nor the advisors pay a fee to *Barron's* in exchange for inclusion in the *Barron's* Top 1,200. Rankings and recognitions are no guarantee of future investment success. *Barron's* "Top 1,200 Financial Advisors" list is based upon data as of September 30th of the preceding year.

About Northwestern Mutual

Northwestern Mutual has been helping people and businesses achieve financial security for more than 165 years. Through a comprehensive 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 \$558 billion of total assets being managed across the company's institutional portfolio as well as retail investment client portfolios, nearly \$35 billion in revenues, and \$2.2 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to more than 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.

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.**

Jerry David uses Prescient Financial Solutions as a marketing name for doing business as a representative of Northwestern Mutual. Michael Erpelding uses Erpelding Wealth Management as a marketing name for doing business as a representative of Northwestern Mutual. Tim Harrison uses Harrison Financial Services as a marketing name for doing business as a representative of Northwestern Mutual. Matthew Heckmann uses Heckmann Financial as a marketing name for doing business as a representative of Northwestern Mutual. Matthew Lytell uses Riverwalk Wealth Advisors as a marketing name for doing business as a representative of Northwestern Mutual. Ryan B. Smith uses Smith Capital Advisors as a marketing name for doing business as a representative of Northwestern Mutual. Scott Sparks uses Sparks Financial as a marketing name for doing business as a representative of Northwestern Mutual. George Starnes III uses G3 Wealth Advisors as a marketing name for doing business as a representative of Northwestern Mutual. Nolan Stokes uses Two Lights Private Wealth as a marketing name for doing business as a representative of Northwestern Mutual. Scott Underwood uses Socium Advisors as a marketing name for doing business as a representative of Northwestern Mutual. Matthew Wunder uses Wunder Financial as a marketing name for doing business as a representative of Northwestern Mutual. Prescient Financial Solutions, Erpelding Wealth Management, Harrison Financial Services, Heckmann Financial, Riverwalk Wealth Advisors, Smith Capital Advisors, Sparks Financial, G3 Wealth Advisors, Two Lights Private Wealth, Socium Advisors, and Wunder Financial are not registered investment advisers, broker-dealers, insurance agencies, or federal savings banks. Jerry David, Michael Erpelding, Tim Harrison, Matthew Heckmann, Matthew Lytell, Ryan B. Smith, Scott Sparks III, George Starnes, Nolan Stokes, Scott Underwood, and Matthew Wunder are Insurance Agents of NM, Registered Representatives of NMIS, and Advisors of NMWMC.

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