

## Northwestern Mutual Leads Industry on Latest Forbes' "Top Financial Security Professionals" and Best-in-State Lists

MILWAUKEE, July 26, 2023 /PRNewswire/ -- Northwestern Mutual announced today that an industry-leading 489 of its advisors earned a spot on *Forbes'* annual lists of top financial security professionals – the company's strongest showing on this prestigious ranking since it debuted in 2021. Twenty-nine of the 489 advisors also appeared among the publication's 2023 "Top 100 Financial Security Professionals," taking more than a quarter of the list.

These *Forbes* lists recognize top-performing financial advisors – at both the national level and by state – who provide holistic financial planning, focusing on risk mitigation, wealth management and a personal planning experience. Honorees are selected using a broad set of criteria that includes production and premiums, assets under management, client retention rates and exhibition of best practices.

"Northwestern Mutual is the undeniable industry leader in financial security, and our presence in this year's rankings proves it," said Tim Gerend, the company's chief distribution officer and a member of the *Forbes* / SHOOK Financial Security Professionals Leadership Advisory Board. "Our approach to financial planning is resonating in the marketplace, and this accolade sends a loud and clear message about the expertise of our advisors who are committed to helping clients build financial security."

Northwestern Mutual's 2023 Top 100 Financial Security Professionals & Best in State List-Makers include:

John Adams	Karen Dry	Ross Levine	Michael Ryan
Phil Adra	Brian Duggan	Ben Levy	Kanan Sachdeva
Bilal Afolabi	Brian Dwyer	Jason Lewis	Justin Saka
Jonathan Aires	Doug Eastman	Jeffrey Lewis	Richard Saka – Top 100
Jason Akers	Brian Eder	Pete Liao	Mike Salierno
John Alcantara	Ryan Edlefsen	Darling Lie-Nielsen	Sara Samuels
Delynn Alexander	Marc Eisenshtat	Qunnie Lin	Cristian Sanchez
Jessica Aliotti	Nate Elias	Mike Lindberg	Theodore Sangalis
Ross Alisiani	Toby Eng	Brady Lindemann	Ryan Saunders
Matthew Allen	Jim Erb	Stacey Loginow	Mark Savino
Hugo Alves	Mike Erpelding	Stephen Lowe	Marissa Savino Williams
Joseph Anderson	Chad Esslinger	Kevin Luchetta	Chris Searbo
Chuck Andrews	Mark Evans	Paul Ludacka - Top 100	Dan Schiffman
Paul Armstrong	Theodore Everson	Mark Lupton	Zach Schmidt
Don Armstrong	Steve Faber	Matthew Lytell	Jessica Schock
Sam Arthur	Thomas Farmer	Jeremiah Mackey	Al Schor
Richard Asel	Benjamin Feldman - Top 100	Sy Maleki - Top 100	Stephen Schwartz

Scott Ashline	Craig Fiedler	Jeff Manderfeld	Russ Schwartzbeck
Bryan Austin	Barry Fies	Edward Mandrin	Mike Sedjo
Glen Babcock	David Finnemore	Drew Manier	Joel Seleskie
Greg Baekey	Jacqueline Fish	David Mann	Scott Sernett
Alan Balayants	Jim Fitzgerald	Natalia Margolis	Brent Seward
G. Andres Baltazar	Scott Fligel	Todd Marschall	Sagar Shah
Jason Bang	Herb Foedisch	Scott Marschall	Ted Shanahan
Bryson Bard	Brian Ford	Christopher Marshall	Stephen Shanley
Timothy Barnhart	Carly Frieling	Reid Matsushima	Chad Shaw
Michael Bartenhagen	Christopher Fugman	David Maury - Top 100	Brent Shaw
Rebecca Bast	Scott Gajda	Brian Mayeu	Gary Shickora
Bradley Baune - Top 100	Thomas Gallina	George Mc Guire	Randolph Shingler
Greg Baune	Ben Gantt	Thomas McBreen	Eugene Shkolnikov
Adam Baur	Chris Garner	Todd McClure	David Shuley
Bryan Beauchamp	Craig Garrison	Matthew McCormick	Nick Shultz
Denise Beaulier	Casey George	Brendan McDermott	Alec Shunk
Steve Bedford	Todd Gindy	Ed McGill - Top 100	Brent Shunk
Steve Beiser	Grant Goeglein	Mike McGinley	David Siegel
Michael Belvin	Howard Goldman III - Top 100	Eric McGough	Bryce Simon
Douglas Benson	Erik Gomez	West McGowan	Monica Sinha
Jesse Bergland	Daniel Gould	Mike McVicker	Derek Skovbroten
David Bernard	Chip Graddy	James Meanix	Mike Slabic
Barbara Bernstein	Matthew Greene - Top 100	Joey Meehan	Henry Sladek
Alex Bierce	Chad Greer	Kyle Menke	Timothy Smith
Brett Bissell	Matthew Greiner	Michael Mennella	Joseph Smith
John Black	Adam Griffin	Harry J. Mentonis	Michael Smith
Brian Blair	Robert Grimm	David Mesa	Bradford Smith
Keenan Blanchford	Cory Grossman	David Miller	Chad Smith
Art Blick	John Groth	Tom Miller	Evan Smith

Mark Boddy	David Gruen	Jeff Miller	Casey Smoot
Brian Boder	Brandon Guntor	William Milne	David Snyder
Justin Boeving	Sandeep Gupta	David Milonas	Andrew Spaanem
Kurt Bogseth	Ed Gurka III	Sebastian Minaudo	Jerod Spaeth
Robert Bolt	Mark Guskey	Tom Mitchell - Top 100	Kevin Spahn - Top 100
John Bongiovanni	Randall Hall	Austin Mitchell	Scott Sparks - Top 100
Chantel Bonneau Stewart	Connor Hall	Steven Miura	Keith Spengel
Kevin Bontrager	Andy Hammond	Keith Moeller	Paul Stadfeld
Victor Borowsky	Mark Hardy	Michael Mohr	Brian Stanley
Steve Braun - Top 100	Daniel Harezlak	Sawyere Monson	Kevin Stein
Leif Briel	Joshua Harmon	Joshua Montanez	John Sterner - Top 100
David Brown	Benjamin Harvey	William Moore, III	Geoff Stevens
Derek Brown	Jay Hatten	Jeremy Moritz	Brad Stewart
Fredrick Bruni	Justin Hattenhauer	Tom Morris	James Stinson
Thomas Buettner	Rob Hayworth	Peter Mortka	Thomas Swartout
Jeff Buffum	Tim Hender	Edward Moyzes	Scott Sweet
Jay Burgman	Matt Henry	James Munder	Lindsey Swenson
Dave Burnett	Dave Herring	Kenneth Murphy	Levi Swenson
Zach Burton	Spencer Hershey Jr.	Derrick Murray	Todd Tauzin
Michael Bush	Tyler Hjelseth	Tony Myers	Raul Tavdy
Joshua Buttrey	Tyler Holden	Hans Myklebust	Gary Taylor - Top 100
Josh Byrd	Blake Hornsby	Daniel Neary	Gregory Telge
Jeff Byrn	James Houghton	Andrew Nelson	Matthew Thibodeau
Maxwell Cahn	Loren Hsiao	William Newman	Wendy Thompson
Michael Calamaras	Rick Hu - Top 100	Dan O'Brien	E. Peter Tiboris
Michael Calamaro	Mark Hubbard	Matthew Occhipinti	Peter Tillinghast - Top 100
Andre Campbell	Ryan Hungershafer	Josh Oertli	Jeffrey Todd
Brett Canna	John Iezzi	Jason Olenski	John Todd III
Lou Cannataro	Anthony Incerto Jr	Kevin Olson	Kenneth Tooke II
Matt Carothers	Charles Irvin	Jacob Overman	Darren Trautmann

Cole Caruthers	Mike Jacob - Top 100	Dan Owen	Todd Trexler
Jorge Casariego	John Jacobs	Nicolas Pakler	Felix Tuccillo III
Henry Cerruti	Josh Jenkins	Kevin Palmiter	Abigail Tuttle
Chase Chaldekas	Dan Jenkins	Josh Parish	David Tyler
Justin Charise	Gilbert Joehl	John Parisi	Scott Underwood
Michael Chartos	Robert Johnson	Geoffrey Passehl	John Van Grinsven
David Clausen	Todd Johnson	Wesley Patterson	Tracy VanDyke
Justin Cleveland	Kevin Johnson	Scott Penning	Sherrie VanKoevering
Joshua Cohen	Christopher Johnston	Jim Pettoirelli	Ben Voigt
DeAndre Coke	Mike Jones - Top 100	Mitch Peyton	Craig Volk
Mike Collins	Nicholas Junta	Shawn Phelps - Top 100	Travis Vongsawad
Chris Collins	Ryan Kahn	Daniel Pifer II	Chris Wade
Frank Conner III	Rick Kalb	Joseph Pitterle	Keith Wagner - Top 100
Martin Connolly	Geoffrey Kasse	Andy Platt	Joshua Waite
Michael Corcetti	David Katz	Michael Polan	Adam Waitzman
Jay Courtney	Larwin Kauffman	Dana Potts	Al Waldrop
Robert Cox	Kevin Kerber	Michael Preston	Greg Wallace
Corey Cresenzi	Armen Khadiwala	Julie Prince	Ryan Walterhoefer
Jon Cross	Hollee Kier	Baji Puram	David Walther
Blake Crousore	Chris Kilgore	Walter Putnam	Jack Wambach
Chris Cruz	Robert Kilroy	Timothy Radden	Matthew Ward
Jimmy Cusimano	Rob King III	Raghunathan Rajagopalan	Andrew Watkins
Matt Cutter	Justin Kirby	Michael Raposa	Andrew Watters
Rob Dalaskey	Dave Klein	Jeff Rapp	Mike Waxberg
Michael D'Aquila - Top 100	Alex Klein	Jake Raska	Sean Westover
David Darlington	John Klich	Andrew Rasmussen	Kyle Wick
Jerry David	David Kreiter	Kevin Regan	Tek Wiegert
Dan Day	Mark Krowiak	Ross Reitsma	Alex Wieme

Lesley Day	Matthew Krueger	Chad Reynolds	Melinda Wilke
Curt DeLeske	Josh Krutoy	John Reynolds	Thom Wilkinson Jr
Seth Delfiner	Mark Kull	Adam Riegel - Top 100	Johnathan Williams
Jay D'Entremont	Repp Lambert II	Kevin Rigenhagen	Josh Willour
Tim Derouin	Nick Langefels	Matt Riggs	Thomas R. Wilmink
Peter Derrenbacker	Sam Laorenza	Matt Robb	Max Wilson
Scott DeSantis	Jim LaPinska	Keith Rollins	Mark Wise - Top 100
Derek DeSanto	Eric Larson	Maria Roloff	Rich Woo
Dave Dettmann	Bruce Laughlin	Marc Rosenberg	Gregory Woods
Frank Di Meglio	Langston Laury Jr.	Alex Rosenblatt	Kyle Wurtzel
Colby Dickson	Tyler Layne	Aubrey Rosser	William Yancey
John Dill	Edward Lee	David Rossett	Kevin Yeagers
James DiNardo	Randy Lehman	Bob Roth	Jarrett Yehlen
Tyrone Dinneen	Jonathan Lehman	Alex Roth	Dae Yoon
Ian Donaldson	Laurie Leja	Ralph Rotman - Top 100	Jim Zara - Top 100
Kevin Dooley	Tom Lenci Jr. - Top 100	Cassie Rotman	Royce Zimmerman - Top 100
Josh Dorfman	Mark Leong	Rob Roy	Daniel Zoll - Top 100
Mark Downs	Josh Lerner	Kurt Rupprecht	Gregory Zub
Nick Drouin			

Earlier this year, Northwestern Mutual advisors exceeded their historical showing on *Forbes'* "Top Women Wealth Advisors," *Barron's* "Top 1,200 Financial Advisors" and *Forbes'* "Top Wealth Advisors Best-in-State." Leading industry publications including *Financial Planning*, *Financial Advisor*, *ThinkAdvisor* and *InvestmentNews* consistently rank Northwestern Mutual Investment Services as a top independent broker-dealer by total revenue.

### **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 111 on the 2023 *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. **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.** Forbes Top Financial Security Professionals list (July 2023). Research and ranking provided by SHOOK Research. Based upon data as of 12/31/2022. Northwestern Mutual and its advisors do not pay for placement on 3rd party rating lists, but do pay marketing fees to these organizations to promote the rating(s). Rankings and recognitions are no guarantee of future investment success.

Advisors who utilize a different firm name do so as a marketing name for doing business as a representative of Northwestern Mutual. Marketing names are not registered investment advisers, broker-dealers, insurance agencies or federal savings banks. Advisors are insurance agents of NM. Investment advisory services provided as Advisors of NMWMC. Investment brokerages services provided as Registered Representatives of NMIS.

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