39 Northwestern Mutual Advisors Represent the Future of Financial Services in Forbes' 2023 Top Next Gen Wealth Advisors Best-in-State List

MILWAUKEE, Aug. 11, 2023 /PRNewswire/ -- Northwestern Mutual is celebrating its 39 financial advisors honored on this year's *Forbes'* Top Next Gen Wealth Advisors Best-in-State list. The accolade recognizes the top advisors across the country building their client lists and leading the way in their state, all the while before they turn 40.

"We know from research that four in five Millennials and Gen Z believe their financial plans need improvement, and they're increasingly turning to financial advisors for advice they can trust," said Aditi Javeri Gokhale, Northwestern Mutual chief strategy officer, president of retail investments and head of institutional investments. "Our company's strategy is to intentionally engage prospective clients when they are younger and emerging in their careers, enabling our advisors to create long-term relationships with clients that bridge 20, 30, and even 40 years."

Northwestern Mutual's 2023 Top Next Gen Wealth Advisors Best-in-State list-makers:

Brian Aikens, Aikens Financial, Akron, Ohio
Joseph Anderson, The Anderson Financial Group, Saratoga Springs, N.Y.
M. Paul Armstrong, Armstrong & Sinoff Financial, Orlando, Fla.
Samuel Arthur, Haven Wealth Advisors, Atlanta
Jason Bell, GBP Wealth Management, Hunt Valley, Md.
Douglas Benson Jr, Benson Wealth Management, Ankeny, Iowa
Andrew Bird, Mosaic Financial Partners, Whitefish Bay, Wis.
Christina Bridgewater, Hepworth & Associates, Boise, Idaho
Martin Burch, BWM Wealth Strategies, Charlotte, N.C.
Brandon Cline, Wilmink Smith Cline Wealth Advisors, Barboursville, W. Va.
John Martin Couric III, Couric Krebs Financial, Charlottesville, Va.
Matthew Cutter, Wellesley, Mass.
James Daffin, Realize Wealth Management, Cincinnati
Scott DeSantis, Civic Financial, Boston
Kevin Earnest, Butterfield Partners, Downers Grove, Ill.
Jacqueline Fish, LifeWorth Financial, Charlotte, N.C.
Merrill Gagne, Gagne Wealth Management Group, Greenfield, Mass.
Brandon Gaines, Todd & Gaines Integrated Wealth Planning, Lexington, Ky.
David Girola, DeRouen Girola & Associates, Lake Charles, La.
Tyler Hjelseth, Edgewater Wealth Management, Tacoma, Wash.
Charles Irvin, Luca Partners, Durham, N.C**.**
Samuel Laorenza, Omni Wealth Management, Woburn, Mass.
Tyler Layne, Layne Financial, Twin Falls, Idaho
Jonathan Lehman, Summit Financial Group, Fort Wayne, Ind.
Brandon McIntyre, Roach McIntyre & Associates, Columbus, Ohio
Austin Mitchell, Kairos Capital Partners, Frisco, Texas
James Munder, Munder Financial, Indianapolis, Ind.
William Newton, Luca Partners, Raleigh, N.C.
Daniel Reisner, Reisner Financial, Tampa, Fla.
Adam Riegel, Ivy Capital Partners, Wellesley, Mass.
Robert Roy, RMG Wealth Management Group, Wilbraham, Mass.
Ryan Schmitt, GSG Wealth Management, Evansville, Ind.
Michael Sedjo, Alpha & Omega Wealth Strategies, Edina, Minn.
Nicholas Shultz, Omni Wealth Management, Woburn, Mass.
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.
Alex Wieme, Stone Arch Advisory Group, St. Cloud, Minn.
Aaron Young, Barnes Young Wealth Advisors, Louisville, Ky.

"Our next generation of advisors is showcasing what it means to be a client-first financial advisor, and this accolade further validates the value they add in people's lives," said Tim Gerend, Northwestern Mutual's chief distribution officer. "At a time when the average age of a wealth manager is mid-50s, we're proud to have so many advisors who are under 40, highly trained, credentialed and ready to help people build comprehensive financial plans."

About the Forbes' 2023 Top Next Gen Wealth Advisors Best-in-State List

Developed by SHOOK Research, the accolade is based on an algorithm of qualitative criterion—mostly gained through telephone and in-person due diligence interviews—and quantitative data. Those advisors that are considered have a minimum of four years' experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass the highest standards of best practices.

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.

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