

Northwestern Mutual launches Market Pathway model portfolios, broadening access to professionally advised offerings

Younger investors can now more easily begin relationships with financial advisors

MILWAUKEE, Nov. 30, 2023 /PRNewswire/ -- Northwestern Mutual announced the expansion of its professionally managed investment offerings with the launch of Signature Portfolios Market Pathway models, which require a minimum investment of only \$5,000 – providing greater access to advised solutions for a range of investing needs.

The portfolios take a straightforward approach to investing using low-cost, broad-market exchange-traded funds that offer exposure and diversification across Northwestern Mutual Wealth Management Company's strategic asset classes. This allows advisors to create investing opportunities for younger clients who want to begin their financial planning goals.

The models come in five varieties based on the investor's risk tolerance, ranging from conservative to very aggressive. They are designed to meet the needs of next-generation clients who are in the beginning stages of wealth building, as well as the needs of clients with multiple accounts that range in size.

"We are excited to deliver a new way for our advisors to serve the unique needs and goals of investors across the spectrum – especially younger clients looking to begin a relationship with a financial professional," said Jeb Bentley, Northwestern Mutual Wealth Management Company President and CEO. "We are keenly focused on supporting the next generation of investors and are proud to offer a new way for our advisors to help them build wealth and greater financial security."

Northwestern Mutual advisors serve clients at all life and financial stages, offering comprehensive planning that focuses on managing risks while growing clients' wealth to ensure financial security over the long term. Amid a historic transfer of generational wealth, the company is well-positioned to provide multi-generational planning and to grow with the next generation of investors. The average age of Northwestern Mutual advisors is 39 years old, while a report from J.D. Power states that the average age of advisors is 57 throughout the rest of the industry.

Northwestern Mutual has seen rapid growth and increasing recognition for its investment offerings in recent years. Northwestern Mutual's client assets under management stands at more than \$250 billion as of October 31, 2023. Northwestern Mutual is the [fifth-largest independent broker-dealers by revenue](#), according to *InvestmentNews*, and among the fastest growing in the United States. The company's financial advisors are regularly recognized in industry rankings, with more than 680 recognitions on top advisor lists from *Forbes* and *Barron's* this year alone.

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.

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