

## More Northwestern Mutual advisors than ever before named to *Forbes'* Top Financial Security Professionals and Best-in-State lists

MILWAUKEE, July 10, 2024 /PRNewswire/ -- Northwestern Mutual announced today that 650 of its financial advisors earned a spot on *Forbes'* Top Financial Security Professionals and Best-in-State lists – the company's largest-ever showing on the prestigious rankings. More than a quarter of the Top 100 Financial Security Professionals were Northwestern Mutual advisors.

"Northwestern Mutual's advisors are helping clients see their opportunities and their blind spots and are putting them on a path to greater financial security," said John Roberts, chief field officer, Northwestern Mutual. "Our advisors understand what clients want out of life, they know how to tailor financial plans to those priorities, and they can offer the broadest range of proven financial solutions to reach them so that they can both protect their risks and grow their wealth."

*Forbes* lists recognize top-performing financial advisors – at both the national level and by state – who excel at providing 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.

Each year, a growing number of advisors from Northwestern Mutual are being named by *Forbes* and other prominent publications as some of the industry's best. In 2024 alone, the company earned spots on *Forbes'* Best-in-State Top Wealth Management Teams, *Forbes'* Top Women Wealth Advisors Best-in-State, *Barron's* Top 1,200 Financial Advisors, and *Forbes'* Top Wealth Advisors & Best-in-State lists.

### 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 over \$627 billion of total assets<sup>1</sup> being managed across the company's institutional portfolio as well as retail investment client portfolios, more than \$36 billion in revenues, and \$2.3 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 110 on the 2024 *FORTUNE* 500 and was recognized by *FORTUNE*® as one of the "World's Most Admired" life insurance companies in 2024.

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.**

<sup>1</sup> Includes investments and separate account assets of Northwestern Mutual as well as retail investment client assets held or managed by Northwestern Mutual.

*Forbes* Top Financial Security Professionals and *Forbes* Best-in-State Top Financial Security Professionals lists (July 2024). Based upon data as of 12/31/2023. *Forbes* Top Women Wealth Advisors Best in State, February 8, 2024. Based upon data as of 9/30/2023. *Forbes* Best-In-State Wealth Management Teams (1/9/2024). Based upon data as of 3/31/23. *Forbes* "America's Top Wealth Advisors" list, (April 2024). Based upon data as of 6/30/2023. *Forbes* "Best-in-State Wealth Advisors" list (April 2024). Based upon data as of 6/30/2023. Research and rankings provided by SHOOK Research. Northwestern Mutual and its advisors do not pay for placement on third 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.

*Barron's* "Top 1,200 Financial Advisors" list (March 2024), based upon data as of 9/30/2023. Northwestern Mutual and its advisors do not pay for placement on third party rating or ranking lists, but instead pay marketing fees to these organizations to promote the rankings and rating(s). Rankings and ratings are no guarantee of future investment success.

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