

## 45 Rising Northwestern Mutual Advisors Listed Among America's Best in Forbes' Latest Next-Gen Ranking

MILWAUKEE, Aug. 8, 2024 /PRNewswire/ -- Forty-five Northwestern Mutual advisors have earned a spot on *Forbes*' 2024 list of America's top up-and-coming wealth professionals. A national list, the publication's annual "Top Next-Gen Wealth Advisors Best-in-State" recognition showcases the industry's most promising talent under the age of 40.

"Northwestern Mutual's future is bright with how many outstanding advisors we have ascending in their early careers and delivering results for clients," said Northwestern Mutual Chief Field Officer John Roberts. "Their commitment to comprehensive financial planning, combining insurance and investments, is uniquely helping more Americans build true financial security."

### About the *Forbes* 2024 Top Next-Gen Wealth Advisors List

*Forbes*' Next-Gen list recognizes elite advisors nationwide who demonstrate excellence across a wide variety of metrics, along with a deep commitment to serving their clients. Northwestern Mutual's showing on *Forbes*' 2024 list was its best ever, with the company's representation jumping 15 percent year over year.

Developed by **SHOOK Research**, the *Forbes*' ranking is based on an algorithm of qualitative criteria – mostly gained through telephone, virtual, and in-person due diligence interviews – and quantitative data. Those advisors who are considered have a minimum of four years of experience, and the algorithm weighs factors including revenue trends, assets under management, compliance records, industry experience and various best practices. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither *Forbes* nor SHOOK receive a fee in exchange for rankings.

### 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 Next-Generation Wealth Advisors Best-in-State list, (August 2024). Research & ranking developed by Shook Research, LLC. Based upon data as of 3/31/2024. 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.

SOURCE Northwestern Mutual

For further information: Stephanie Siewert, mediarelations@northwesternmutual.com, 1-800-323-7033