

Northwestern Mutual Leads Industry with Most Certified Financial Planners in Prominent New Ranking

MILWAUKEE, Aug. 14, 2024 /PRNewswire/ -- Northwestern Mutual leads the financial services industry with the most CERTIFIED FINANCIAL PLANNER™ professionals, according to a new ranking announced by *Financial Planning*. This is the second consecutive year in which Northwestern Mutual led the list of Independent Broker-Dealers with advisors who have earned the CFP® designation. Among the firms ranked, Northwestern Mutual's total of 1,498 advisors holding the CFP® certification outpaced its nearest competitor company by more than 200.

CFP® is known as *the standard* for financial planning. To qualify for the designation, CFP® professionals must meet rigorous education, training and ethical standards, and commit to serving their clients' best interests today to prepare them for a more secure tomorrow.

"Americans with financial anxiety are looking for an expert advisor who they can trust with their worries and their dreams," said John Roberts, Northwestern Mutual's chief field officer. "Our advisors and teams stand out because they are committed to the highest standards of comprehensive financial planning, elegantly integrating risk management and wealth management in an approach that's designed to deliver better outcomes to clients over the long-term more often. Our advisors alone are able to provide our complete set of financial solutions to identify and address gaps and meet clients where they are."

Additionally, *Financial Planning*, a leading news outlet for financial advisors and wealth management professionals, listed Northwestern Mutual as the sixth-largest firm in their latest ranking of the nation's top independent broker-dealers. The company also landed among the top-four IBDs for overall revenue growth, climbing five spots from its 2023 ranking.

At the close of the second quarter of 2024, Northwestern Mutual held more than \$309 billion in client investment assets, up nearly 20% over the year prior. With a combined \$655 billion in company and clients assets, Northwestern Mutual delivers financial security to more than five million Americans through life insurance, long-term care insurance, annuities, disability income, and brokerage and advisory services.

The firm's financial advisors continue to garner recognition as well, with nearly 200 recognized on the *Forbes* [Best-in-State](#) and [Top Wealth Advisors](#) lists for 2024. Additionally, *Investment News* earlier this year listed Northwestern Mutual as the fourth-largest independent broker-dealer by 2023 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 over \$655 billion of total assetsⁱ 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.**

ⁱ Includes investments and separate account assets of Northwestern Mutual as well as retail investment client assets held or managed by Northwestern Mutual.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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For further information: Paul Imig, 1-800-323-7033, mediarelations@northwesternmutual.com

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