

Northwestern Mutual Quadruples its Showing on Forbes Annual List of America's Top Advisory Teams

MILWAUKEE, Jan. 9, 2025 /PRNewswire/ -- Northwestern Mutual announced today that 174 of the company's firms have been named to *Forbes*' Best-in-State lists of Top Wealth Management Teams for 2025. This prominent national ranking signifies the teams' industry leadership, elite capabilities, and commitment to clients.

"Millions of Americans are on a path to greater financial security thanks to the trusted partnership and expert guidance of Northwestern Mutual advisors," said John Roberts, the company's chief field officer. "Their commitment to clients stands apart in the industry and continues to earn well-deserved acclaim. Our 174 *Forbes*' honorees – quadruple the number recognized just one year ago – are proof that Northwestern Mutual's comprehensive approach to financial planning is resonating in the marketplace and is helping more Americans build financial security."

The *Forbes* Top Wealth Management Teams lists – shown nationally and state by state – published today. The publication developed the list in conjunction with SHOOK Research, evaluating teams based upon a variety of key factors, including total revenue, headcount, assets under management and other quantitative measures, along with in-person interviews, service models, advisors' skill sets and other qualitative criteria.

Northwestern Mutual's financial experts continue to garner recognition, with nearly 200 named to *Forbes*' Best-in-State and Top Wealth Advisors lists earlier in 2024. The organization also leads the financial services industry with the most CERTIFIED FINANCIAL PLANNER® (CFP) professionals according to the publication *Financial Planning*.

The organization's field force of financial advisors has never been larger, more diverse or more productive in the company's 167-year history. At the close of the third quarter of 2024, Northwestern Mutual held more than \$331 billion in client investment assets, up nearly 18% over the year prior – as well as more than \$2 trillion in life insurance protection in force. With a combined \$655 billion in company and client 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.

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 trust 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.

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