

Northwestern Mutual Breaks Company Record on Forbes' Latest List of Nation's Top Wealth Management Teams

230 Northwestern Mutual teams recognized among industry's leaders – a 32% jump year-over-year

MILWAUKEE, Jan. 8, 2026 /PRNewswire/ -- Northwestern Mutual announced that 230 of its financial planning practices have been recognized on *Forbes'* prestigious [2026 Top Wealth Management Teams Best-in-State](#) list, marking a 32% increase from the previous year.

Developed in partnership with SHOOK Research, this list evaluates teams based on a range of key performance indicators, such as total revenue, team size, assets under management, and other quantitative metrics. A variety of qualitative factors are considered as well, including in-person interviews, service models, and advisors' expertise.

"We are immensely proud to see a record number of our financial advisors and teams recognized by *Forbes* – a testament to their expertise, empathy, and dedication to clients," said John Roberts, Northwestern Mutual's chief field officer. "Together, we are securing and strengthening the financial futures of Americans and their loved ones. As part of a comprehensive plan designed to deliver superior financial results over the long-term, our trusted advisors provide clients with access to a full suite of sophisticated investment solutions and exclusive, world-class insurance products."

A growing number of Northwestern Mutual's financial professionals are earning national acclaim for their client-centric commitment and performance within the industry. Last year alone, more than 800 were featured on [prominent lists by *Forbes* and *Barron's*](#).

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 nearly \$700 billion of total assetsⁱ being managed across the company's institutional portfolio as well as retail investment client portfolios, more than \$38 billion in revenues, nearly \$2.4 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 109 on the 2025 *FORTUNE*® 500 and was recognized by *FORTUNE* as one of the "World's Most Admired" life insurance companies in 2025.

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.**

Forbes "Best-in-State Wealth Management Teams" list, (January 2026). Research & ranking developed by Shook Research, LLC. Based upon data as of 3/31/2025 Northwestern Mutual (NM) and its advisors do not pay for placement on 3rd party rating or ranking lists. NM and its advisors do, however, pay marketing fees to these organizations to promote the rating or ranking(s). Rankings and recognitions are no guarantee of future investment success.

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

SOURCE Northwestern Mutual

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<https://news.northwesternmutual.com/2026-01-08-Northwestern-Mutual-Breaks-Company-Record-on-Forbes-Latest-List-of-Nations-Top-Wealth-Management-Teams>