

Northwestern Mutual Represents Nearly One Third of Forbes' Top Financial Security Professionals List

Company also sees 22 percent increase in Best-in-State list

MILWAUKEE, July 9, 2026 /PRNewswire/ -- Earlier today, a record number of Northwestern Mutual financial experts were recognized among America's top advisors for delivering comprehensive planning to their clients. The company represented nearly one-third of the [Forbes | SHOOK Top Financial Security Professionals](#) list, earning 31 out of 100 spots on the national ranking.

Additionally, more than 930 of the company's advisors earned a spot on the publication's [Best-in-State Financial Security Professionals](#) list – a jump of 22 percent from last year. Overall Northwestern Mutual has more representation on these lists than any other company or firm.

"Northwestern Mutual's industry-leading performance on this year's *Forbes'* Top Financial Security Professionals list reflects the trust our advisors earn every day, and the value of the planning they deliver to clients," said John Roberts, the company's chief field officer. "As more Americans seek guidance to navigate increasingly complex financial decisions, this recognition underscores Northwestern Mutual's commitment to personalized financial plans, combining insurance and investment solutions, and the essential role our advisors play in helping clients build them."

The rankings recognize top financial advisors at the national and state levels who use life insurance and annuities as part of comprehensive, client-focused financial planning. Honorees are selected through a combination of qualitative and quantitative criteria, including assets under management, client impact, business practices, production, persistency, industry experience, and compliance records.

The recognition comes at a time when many Americans are placing greater value on trusted financial guidance. [Northwestern Mutual's Personal Prosperity Index](#) found that people who worked with a financial advisor to create a comprehensive financial plan feel more prosperous than those who do not. This underscores how, through integrated solutions spanning life insurance, annuities, investment and wealth management strategies, Northwestern Mutual advisors can play a crucial role in helping clients navigate financial complexity and plan with confidence.

Northwestern Mutual's expanded presence on the *Forbes* list reflects the company's ability to deliver high-quality, holistic financial guidance at scale through a nationwide advisor network, supported by a broad suite of insurance and investment solutions. The result underscores the strength of Northwestern Mutual's advisor model and its ability to meet rising demand for trusted financial advice.

The recognition also comes as demand for financial guidance continues to grow, even as the industry faces a long-term advisor pipeline challenge. [According to Cerulli](#), more than one-third of financial advisors are expected to retire this decade, while [McKinsey](#) projects a shortage of roughly 100,000 advisors over the next 10 years. Against that backdrop, Northwestern Mutual continues to invest in building the next generation of advisors, recruiting and developing thousands of financial representatives and interns from across the country and across industries.

To learn more about Northwestern Mutual's careers, visit: <https://careers.northwesternmutual.com/>.

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 more than \$780 billion of total assets¹ managed across the company's institutional portfolio as well as retail investment client portfolios, more than \$40 billion in revenues, and \$2.5 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to more than five million people with life insurance, disability income insurance, long-term care insurance, annuities, and brokerage and advisory services. Northwestern Mutual ranked 109 on the 2026 *FORTUNE* 500 and was recognized by *FORTUNE*[®] as one of the "World's Most Admired" life insurance companies in 2026.

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.

¹ Includes investments and separate account assets of Northwestern Mutual as well as retail investment assets held or managed for clients.

*The Forbes | SHOOK® Top Financial Security Professionals and Best-in-State Financial Security Professionals rankings are the product of SHOOK Research, LLC's independent research and due diligence and its proprietary ranking methodology. The rankings are published and distributed by Forbes. Data as of December 31, 2025. Published by Forbes (July 2026).

SHOOK Research's proprietary methodology and ranking algorithm incorporates in-person, virtual, and telephone due diligence meetings to evaluate each professional across criteria such as client impact, industry experience, client retention, review of best practices, credentials, compliance records, and firm nominations, as well as quantitative factors including assets under management, sales figures, and revenue generated for their firms. Financial Security Professional ("FSP") refers to those professionals who are properly licensed to sell life insurance and annuities. FSPs may also hold other credentials and licenses which would allow them to offer investments and securities products through those licenses.

Investment performance is not a criterion, as client objectives and risk tolerances vary and these professionals rarely have audited performance reports. SHOOK Research's rankings are intended to help investors identify and evaluate financial services professionals and are not indicative of future performance or representative of any one client's experience. Past performance is not indicative of future results. The rankings are for informational purposes only and should not be construed as a recommendation or endorsement to hire any specific financial services professional. SHOOK Research does not assume any liability for actions taken based on the rankings.

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