Northwestern Mutual Celebrates More Than 40 Advisors Recognized on Forbes Next-Gen Wealth Advisors Lists

Recognition underscores company's growing investment in the next generation of financial advisors

MILWAUKEE, Aug. 11, 2026 /PRNewswire/ -- Today, 42 Northwestern Mutual financial professionals were recognized as industry standouts as *Forbes* | SHOOK announced their 2026 Best-in-State Next-Gen Wealth Advisors, including one ranking among the nation's top 100. Over the last five years, Northwestern Mutual has more than doubled its presence on the Best-in-State list, demonstrating the company's commitment to recruiting and developing emerging advisor talent as Americans seek more personalized financial guidance.

"At a time when many of our industry's financial representatives are approaching retirement, our next generation of advisors is thriving – and their clients and loved ones are on a path to greater financial security," said John Roberts, Northwestern Mutual's chief field officer. "I'm deeply proud of our advisors and their commitment to comprehensive planning – bringing insurance and investments together in a customized approach to help people reach their wealth goals and protect what they've already built."

The *Forbes* | SHOOK Top Next-Gen Wealth Advisors & Best-in-State Next-Gen Wealth Advisors lists recognize top financial advisors under age 40 who deliver comprehensive wealth management and financial planning services to clients. Rankings are determined using both qualitative and quantitative factors, including client impact, assets under management, revenue trends, and compliance records.

Financial planning is more accessible than ever, yet financial anxiety remains at near-record highs across America. Many are worried about the impact of inflation, taxes, and the unexpected – concerns exacerbated by a $12 trillion protection gap and a nearly $4 trillion retirement shortfall across the U.S. According to Northwestern Mutual's 2026 Personal Prosperity Index, financial anxiety is the leading factor affecting Americans' mental health today.

To help secure and strengthen the financial futures of Americans and their loved ones, Northwestern Mutual is committed to supporting the growth and development of early-career advisors. This year, Northwestern Mutual will recruit and develop thousands of advisors – and continue to invest in its seasoned financial experts.

That investment begins early – including through its college internship program, which introduces emerging talent to the impact and long-term potential of a career in financial planning. With nearly two-thirds of Northwestern Mutual's college financial representatives converting to full-time roles and growing into leadership, the company has continued to see growth in its internship program year over year. The program provides extensive training resources, mentorship opportunities, and digital tools to create an engaging, hands-on experience that helps set future advisors up for success. Its continued growth, along with recognition from National Intern Day's Top 100 Internship Programs and *Forbes'* Best Employers for New Grads, reflects Northwestern Mutual's long-term commitment to developing the next generation of advisors ready to help clients on their path to financial security with confidence.

Explore careers at Northwestern Mutual or learn more about working with a financial advisor.

About Northwestern Mutual

Northwestern Mutual has been helping people and businesses achieve financial security for nearly 170 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 assets[1] 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 Next-Gen Wealth Advisors and *Forbes* | SHOOK Best-in-State Next-Gen Wealth Advisors 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 March 31, 2026. Published by *Forbes* (August 2026).

SHOOK Research's proprietary methodology incorporates in-person, virtual, and telephone due diligence meetings. The ranking algorithm weighs factors such as client impact, industry experience, client retention, credentials and compliance records, with a focus on advisors who exemplify the best practices in client service. SHOOK also considers assets under management and revenue generated for their firms.

For this recognition, SHOOK considered advisors born from 1987 to present with a minimum of four years of experience as an advisor.

Investment performance is not a criterion, as client objectives and risk tolerances vary and advisors rarely have audited performance reports. SHOOK Research's rankings are intended to help investors identify and evaluate financial advisors 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 investment advisor. SHOOK Research does not assume any liability for actions taken based on the rankings.

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