

## Northwestern Mutual Welcomes LearnVest

LearnVest, one of the fastest-growing financial platforms in America, becomes a wholly owned subsidiary of Northwestern Mutual

Northwestern Mutual today announced it has completed the acquisition of LearnVest, a leader in online financial planning and client experience technology. Their partnership brings together Northwestern Mutual's financial planning expertise with LearnVest's breakthrough technology and innovative financial planning platform.

"People want simpler ways to plan for their financial lives and innovative technology for managing their plans," says Northwestern Mutual's chairman and CEO John E. Schlifske. "The combination of LearnVest and Northwestern Mutual will address those needs by providing our clients a better financial planning experience, and enabling our financial professionals to deliver trusted financial advice to more people who need it."

"LearnVest is committed to making financial planning accessible to millions nationwide, and we look forward to accelerating our mission in the chapter ahead. We are leveraging innovative technology to simplify and improve the dynamic financial planning experience for financial professionals and clients alike," adds Alexa von Tobel, founder and CEO of LearnVest.

### Ramping up to deliver a client-centered experience

LearnVest will remain its own brand with von Tobel as its leader. It currently has about 1.5 million users, over 25,000 clients under "LearnVest at Work," and close to 10,000 premium clients. The company has 150 employees between New York and Arizona.

Northwestern Mutual has more than 4.2 million clients. As the companies combine, customer bases and employment will grow at each organization.

### About Northwestern Mutual

Northwestern Mutual has been helping families and businesses achieve financial security for nearly 160 years. Our financial representatives build relationships with clients through a distinctive planning approach that integrates risk management with wealth accumulation, preservation and distribution. With more than \$217 billion in assets, \$26 billion in revenues, \$90 billion in assets under management, and more than \$1.5 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to more than 4.2 million people who rely on us for insurance and investment solutions, including life, disability and long-term care insurance; annuities; trust services; mutual funds; and investment advisory products and services.

Northwestern Mutual is the marketing name for The Northwestern Mutual Life Insurance Company, Milwaukee, WI, and its subsidiaries. Northwestern Mutual and its subsidiaries offer a comprehensive approach to financial security solutions including: life insurance, long-term care insurance, disability income insurance, annuities, investment products, and advisory products and services. Subsidiaries include Northwestern Mutual Investment Services, LLC, broker dealer, registered investment adviser, member FINRA and SIPC; the Northwestern Mutual Wealth Management Company, limited purpose federal savings bank; and Northwestern Long Term Care Insurance Company.

### About LearnVest

LearnVest is one of the fastest-growing financial planning platforms in America. Through the comprehensive and dynamic LearnVest Program, LearnVest helps thousands of households nationwide take control of their money. LearnVest's innovative solution joins powerful technology with a force of LearnVest Planners to efficiently deliver affordable, accessible and unbiased financial advice.

As a disruptor in the financial planning space, LearnVest has been awarded numerous accolades for its product innovation. These include being named as one of Time's "50 Best Websites," Fast Company's "Most Innovative Companies," and three years running Best of Show awards at FinovateFall 2011, 2012 and 2013. Since its launch in 2009, LearnVest has raised nearly \$75MM in venture financing. For more information about LearnVest, please visit [www.LearnVest.com](http://www.LearnVest.com).

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For further information: Betsy Hoylman, 1-800-323-7033, [mediarelations@northwesternmutual.com](mailto:mediarelations@northwesternmutual.com)

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