If you live for it, we’ll help you plan for it.

Financial planning with one goal in mind: yours.
YOUR BEST LIFE SHOULDN’T HAVE TO WAIT.

With our unique approach to planning, you won’t have to.

We’ll help you do the things that are important to you now and later on — like going on once-in-a-lifetime vacations, saving for your kids’ dream schools, buying a home (or your home away from home), starting a business, or retiring early.

We’ll base your plan on you, your life, and your priorities. And as they change over time, your advisor will work with you to shift the financial strategies in your plan — keeping your plan aligned with your priorities, so you can worry less and live more.

We can help you not only grow your money, but also protect everything you’ve worked so hard for — so your finances can take you further.

Using time-tested strategies for growth and protection personalized to you, we’ll tailor your plan from a range of financial options built to reinforce each other. It’s an approach shown to give you better long-term financial outcomes than other approaches — helping you reach goals for tomorrow while still enjoying the things you love to do today.
IT’S NOT JUST A PLAN FOR YOUR MONEY, IT’S A PLAN FOR YOUR LIFE.

You probably have all kinds of goals for today, and down the road. We’ll tailor a range of strategies to help you do things like:

Manage your debt
Whether it’s credit cards, student loans, or a mortgage, we’ll help you manage your debt while making progress on your other goals.

Protect what matters
Your plan can include ways to protect those closest to you and your income, helping you make sure that your loved ones will be OK financially, even if the unexpected happens.

Grow your wealth
Together, we’ll tailor an investment strategy around your goals. Whether you’re just starting out or you’re ready for more specialized wealth management, we’ve got the services to get you where you want to go.

Save for education
With tuition costs on the rise, we’ll recommend the right savings strategies, like a 529 plan or others, to make sure your kids have their choice of schools.

Live well in retirement
With options like 401(k)s, IRAs, and annuities, we’ll help you maximize your savings and secure income for life so you can make the most of your retirement. Even whole life insurance could help reinforce your investments with protection and guaranteed growth. Plus, long-term care planning can give you more options so you can keep living the life you want.

Plan your estate
Your advisor can work with other professionals, like attorneys and tax advisors, to help with things like setting up trusts for your kids, planning for tax efficiencies, directing charitable donations, and protecting your estate, so you can be sure the plans you have for your legacy are honored.

Build a business
From risk management and employee benefits to succession, we’ve got more financial options designed to meet the unique needs of opening a business or growing the one you already have.
WHAT YOU GET WHEN YOU WORK WITH US

An expert to partner with
Your advisor is there to listen to what’s important to you, now and years from now. To think of all the what-ifs (so you don’t have to), guiding you as your goals change and helping you meet each one.

A plan tailored to your life
Your personalized financial plan balances your current and future priorities. It puts all the pieces of your financial life in one place so you can make the best decisions and track your progress along the way.

Top-rated products and services
Nerdwallet found that we’re the best life insurance company for consumer experience, and we’re a top 10 independent investment broker-dealer. So you’ll get a wide range of financial options, personalized to you.
WHAT YOUR PLAN LOOKS LIKE

Since your Northwestern Mutual financial plan is designed specifically for you, no two plans are alike. It’s also designed to be flexible as your life and priorities change — and it’s digital, so you can check in on your plan and track how you’re doing over time, anytime. With your personalized plan, we’ll look at:

1 Where you are today
   We’ll look at where you’re starting from, wherever that is, and give you a snapshot of your financial big picture — so you can see exactly where you stand right now.

2 Where you want to go
   Whether it’s managing debt, saving for a new home, or retirement, you’ll see how close you are to your goals, what’s working, any gaps you might have, and any opportunities we uncover.

3 A range of options to get you there
   Each recommendation, which could include investments for growth, insurance for protection, and annuities for retirement income, is designed to reinforce each other so your plan can work its hardest for you.

All of your finances in one place
   Your Northwestern Mutual online account is there for you 24/7 and accessible on any device, so you can connect your accounts to track your cash flow, savings, and investments. You can also access digital tools like our retirement and life insurance calculators, securely share documents with your advisor through the site or mobile app, and get insights and articles tailored to your goals.
THE NORTHWESTERN MUTUAL DIFFERENCE

As a mutual company, we report to you, not Wall Street. And that means when we do well, you do well, too. We lead the industry in giving back to our policyowners — issuing dividends every year since 1872. Here are some more reasons why over 4.9 million people put their trust in us:

A++
AAA, Aaa, and AA+: we’ve earned the highest financial strength ratings awarded to life insurers from all four major rating agencies.

No. 1
FORTUNE® named us one of the World’s Most Admired Companies, ranking us #1 among life insurers.

97%
The percentage of our clients who stay with us year over year.

Northwestern Mutual is helping to speed up the search for a cure to childhood cancer and to support families battling the disease. Learn more about how we’re helping at NMFoundation.com.

No investment strategy can guarantee a profit or protect against loss. All investments carry some level of risk.

A client must have a need for the death benefit at the time life insurance is purchased. Using cash values to supplement retirement income will reduce benefits and may affect other aspects of the plan.

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Northwestern Mutual continues to have the highest financial strength ratings awarded to any U.S. life insurer by all four of the major rating agencies: A.M. Best Company, A++ (highest), June 2022; Fitch Ratings, AAA (highest), August 2022; Moody’s Investors Service, Aaa (highest), May 2022; S&P Global Ratings, AA+ (second highest), July 2022. Third-party ratings are subject to change. Ratings are for The Northwestern Mutual Life Insurance Company and Northwestern Long Term Care Insurance Company.

Ranked for “Financial Soundness,” “Quality of Products/Services,” and “Use of Corporate Assets.” To determine the best-regarded companies in more than 50 industries, Fortune asked executives, directors, and analysts to rate enterprises in their own industry on nine criteria. Details at fortune.com.

Loyalty is based on Northwestern Mutual client data.

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. Northwestern Long Term Care Insurance Company (NLTC), Milwaukee, WI (long-term care insurance), subsidiary of NM. Northwestern Mutual Investment Services, LLC (NMIS) (securities), subsidiary of NM, broker-dealer, registered investment adviser, member FINRA and SIPC. Northwestern Mutual Wealth Management Company® (NMWMC) (fiduciary and fee-based financial planning services), subsidiary of NM and federal savings bank.

Investment products and trust services are not insured by the FDIC. Refer to appropriate product and service disclosure brochures for information about NMS or NMWMC services before investing. Many Northwestern Mutual financial professionals are qualified to offer some but not all of the products and services described in this brochure.

Not all Northwestern Mutual representatives are advisors. Only those representatives with the titles “Financial Advisor” or “Wealth Management Advisor” are credentialed as NMWMC representatives to provide advisory services.