

Why Northwestern Mutual?

Facts for 2022

What we do

As a company, we exist to free Americans from financial anxiety.

That's why we approach financial planning differently. Instead of starting with our clients' finances, we start with them: their lives, their families, their priorities. So the strategies we recommend are tailored from a wide range of financial options built to reinforce each other, like investments for growth, insurance for protection, and annuities for guaranteed income in retirement—helping our clients worry less and live more.

What we offer:

- Financial Planning
- Insurance
- Investment Services
- Wealth Management
- Retirement Planning
- Estate Planning
- Long-term Care
- Business Planning
- Education Funding

Profile

Chairman, President & CEO:
John E. Schlifske

Revenue: \$34 billion

FORTUNE 500 rank: No. 90

Employees: 7,600+

Financial professionals: 9,900+

Headquarters: Milwaukee, Wis.



FORTUNE's® 2022 World's Most Admired Companies¹

#1 among life insurers for
"Financial Soundness,"
"Quality of Products/Services," and
"Use of Corporate Assets."

Unsurpassed Financial Strength²

with total company assets of
\$335 billion

Aaa
HIGHEST

Moody's
Investors
Service

A+++
HIGHEST

A.M. Best
Company

AAA
HIGHEST

Fitch Ratings

AA+
SECOND
HIGHEST

S&P Global
Ratings

97%

of policyowners stay
year after year³



U.S. Independent Broker-Dealer⁴

Measured by 2020 revenue

Wealth Management

\$244 billion⁵

retail investment client assets held or
managed by Northwestern Mutual



Largest direct provider
of individual life
insurance in the U.S.⁶



Total clients

4.9+ million



Industry leader in total dividend payout

\$6.5 billion^{7,8}

Figures as of December 31, 2021, unless otherwise noted.

¹To 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.

² Among U.S. life insurers. Ratings are for The Northwestern Mutual Life Insurance Company and Northwestern Long Term Care Insurance Company, as of the most recent review and report by each rating agency. Ratings as of: 12/21 (Moody's Investors Service), 05/21 (A.M. Best Company), 12/21 (Fitch Ratings), 07/21 (S&P Global Ratings). Ratings are subject to change.

³ Loyalty is based on Northwestern Mutual client data.

⁴ Ranking for Northwestern Mutual Investment Services, LLC. Measured by 2020 revenue. Sources: *Financial Advisor* and *InvestmentNews*, April 2021, *Financial Planning*, August 2021.

⁵ Combined client assets of Northwestern Mutual Investment Services, LLC (NMIS) and Northwestern Mutual Wealth Management Company (NMWMC) as of December 31, 2021. The advisory programs offered by NMWMC are in conjunction with brokerage services from NMWMC's affiliate, NMIS. NMIS is a wholly owned subsidiary of Northwestern Mutual.

⁶ Latest U.S. rank as of 2020 based on direct premiums written. Source: S&P Capital IQ Pro. Prepared and calculated by Northwestern Mutual.

⁷ Decisions with respect to the determination and allocation of divisible surplus are left to the discretion and sound business judgment of the company's Board of Trustees. There is no guaranteed specific method or formula for the determination or allocation of divisible surplus. Accordingly, the company's approach is subject to change. Neither the existence nor the amount of a dividend is guaranteed on any policy in any given policy year.

⁸ Expected 2022 total dividend payout.

(REV 0222)

Who we are

Northwestern Mutual is a FORTUNE 500 company that provides a wide range of financial services to more than 4.9 million people.

And as a mutual company, we answer to our policyowners—not Wall Street. We began in Wisconsin in 1857, and today we're one of America's top companies, with a unique culture deeply dedicated to helping people achieve financial security.

What sets us apart:

- Unsurpassed financial strength
- A long-term approach to planning
- Personal guidance from financial professionals
- A robust digital experience
- Low cost⁹



Life insurance protection in force

\$2.1 trillion
for 4.15+ million people

2021 insurance claims paid

\$6.2 billion

Life claims: \$5.4 billion
Disability claims: \$620 million
Long-term care claims: \$133 million

No. 1 in Disability Income Insurance^{10,11}

817,000 individuals and employees

No. 3 in Individual Long-term Care Insurance^{10,11}

269,000 individuals

Annuities

\$38.7 billion

in assets in 406,000 client contracts



Venture Investments

Funds allocated to NM Future Ventures, Cream City Venture Capital and Wisconsin Valley Ventures

\$225+ million

with committed capital and support for Female Founders and Black Founders



Giving back through Northwestern Mutual Foundation

\$445+ million¹²

Children's cancer research funded
500,000+ hours¹²

⁹ According to Fitch Ratings' 2021 report, which stated, "NM is known as a lower-cost competitor in the life insurance industry."

¹⁰ Source: S&P Capital IQ Pro. Prepared and calculated by Northwestern Mutual.

¹¹ U.S. rank based on direct premiums earned. Disability income insurance rank reflects Individual Business, Long-Term category (benefit periods longer than two years). Long-term care insurance rank reflects Individual Long-Term Care Insurance category. Rankings are as of 2020.

¹² Figures are cumulative totals.

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