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Socium Advisors Appoints Ron Joelson to Advisory Board

Saint Louis, MO – May 31, 2024 – [Socium Advisors](#), a leading financial planning firm affiliated with [Northwestern Mutual](#), is thrilled to announce the appointment of Ron Joelson to the firm's Advisory Board. In this role, Joelson will play a pivotal role in advising on leadership development within the organization.

"We couldn't be more excited about this monumental appointment," said Socium CEO and Founder Scott Underwood. "Ron's incredible expertise in the financial industry, alongside the strength of our current investment committee is a dream partnership that can positively impact our clients."

Joelson, Northwestern Mutual's former Executive Vice President and Chief Investment Officer, brings a wealth of experience and insights from his previous roles. With a strong background in investment management and leadership, Joelson will undoubtedly make significant contributions to Socium's management approach.

In his previous role at Northwestern Mutual, Joelson shared his extensive investment experience, expertise, and insights with field offices, teams, and clients. He was responsible for the company's substantial \$300 billion General Account investment portfolio and oversaw various departments, demonstrating his comprehensive understanding of investment asset classes, risk management, and analytics.

About Socium Advisors: Socium (n) – partner, ally

At Socium, we derive our name from what we care about the most: building genuine partnership. To us, this extends far beyond meetings or business transactions. From outcome-based planning to sufficient risk protection, to long-term goal funding, we're passionate about paving the way to prosperous futures for our clients and mutual accountability along the way. Together, our in-house team and network of national affiliates combine decades of industry experience with a diverse set of skills to ensure that the ways we serve our clients reflect their intentions, input, and needs. Our comprehensive approach focuses on seven interconnected components, all of which are vital to a complete financial blueprint. This approach allows our clients to have the best experience in every area from one cohesive source. Socium Advisors is recognized as an industry leader having been named Barron's "Top 1200 Financial Advisors" in 2019, 2020, 2021 and 2022.

Barron's "Top 1,200 Financial Advisors" list (March 2022, March 2021, March 2020, March 2019), based upon data as of September 30th of the preceding year. Northwestern Mutual and its advisors do not pay for placement on 3rd party rating lists but do pay marketing fees to these organizations to promote the rating(s). Rankings and recognitions are no guarantee of future investment success.

About Northwestern Mutual

Northwestern Mutual has been helping people and businesses achieve financial security for more than 165 years. Through a holistic 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 \$570 billion in combined company and client assets, \$34 billion in revenues, and \$2.1 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to nearly five million people with life, disability income and long-term care insurance, annuities, and brokerage and advisory services. Northwestern Mutual ranked 97 on the 2022 FORTUNE 500 and was recognized by FORTUNE® as one of the "World's Most Admired" life insurance companies in 2022.

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).

Members of Socium Advisors use Socium Advisors as a marketing name for doing business as representatives of Northwestern Mutual. Socium Advisors is not a registered investment adviser, broker-dealer, insurance agency or federal savings bank. Advisors are insurance agents of NM. Investment advisory services provided as Advisors of NMWMC. Investment brokerages services provided as Registered Representatives of **NMIS**.