SOCIUM ADVISORS | NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP

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Socium Advisors Announces Promotion of PJ McDaniel to Partner

St. Louis, MO – September 30, 2024 – Socium Advisors, a leading Wealth Management firm under Northwestern Mutual, is pleased to announce the promotion of PJ McDaniel to Partner, effective immediately.

PJ, a seasoned financial services executive, joined Socium Advisors in 2023 as the Chief Growth Officer. PJ has held C-suite leadership roles at several financial services institutions, and most recently, he was a partner at an investment management firm that was part of a network of 90 other wealth management firms with a collective $350 billion in assets under management. PJ credits his success to his deep understanding of the financial industry, including the needs of clients and financial advisors, and his ability to foster organic growth.

According to Scott, PJ's role at Socium Advisors has been transformative for the firm. "Having someone dedicated to our growth has been instrumental in helping us achieve our goals." PJ's strategic acumen and his ability to cultivate deep relationships with financial advisors nationwide have been key factors in driving the firm's growth.

As the firm continues to grow, Socium recognizes the importance of diversifying its partnership growth strategy. Since joining Socium, PJ has led 2 mergers of partners into Socium with several more in the pipeline for 2025 and beyond. Socium sees the value of upgrading the client experience by adding additional services and specialties. For example, the team has an estate planning expert on retainer to help create tax efficiency in complicated client situations.

“Investors are demanding more of the financial advisor. Socium has the unique blend of value-added services clients require, such as estate planning, with talented next generation advisors and industry leading organic growth. When you blend those themes together, it creates an ideal platform for advisors looking for an upgraded experience,” says PJ.

About Socium Advisors

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, 2022, 2023 and 2024.

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About Northwestern Mutual

Northwestern Mutual has been helping people and businesses achieve financial security for more than 165 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 over $627 billion of total assets[1] being managed across the company's institutional portfolio as well as retail investment client portfolios, more than $36 billion in revenues, and $2.3 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to more than five million people with life, disability income and long-term care insurance, annuities, and brokerage and advisory services. Northwestern Mutual ranked 110 on the 2024 *FORTUNE* 500 and was recognized by *FORTUNE*® as one of the "World's Most Admired" life insurance companies in 2024.

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 client assets held or managed by Northwestern Mutual.