

FOR IMMEDIATE RELEASE

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jenny.meassick@nm.com**Socium Advisors Welcomes John Unterreiner***Unterreiner joins Socium as Director of Philanthropic Planning*

Saint Louis, Mo.– Dec. 12, 2024 – Today Northwestern Mutual, a leading financial services company, is proud to announce John Unterreiner has joined St. Louis-based Socium Advisors as the firm’s director of philanthropic planning. In his new role he will help clients create intentional giving plans, facilitating the discovery of their values and integrating these into estate plans, donor-advised funds, and family foundations. Additionally, he will structure gifting options to optimize charitable impact, develop financial literacy curricula for the next generation, and lead family meetings to ensure smooth transitions of generational wealth.

“We’re excited to have John join Socium Advisors,” said CEO and Founder Scott Underwood. “His expertise and passion for philanthropy are a perfect fit for our team. John’s commitment to lifelong learning and charitable giving will strengthen our mission and enhance the services we provide to clients.”

Unterreiner’s career began with 12 years in healthcare and non-profit leadership, where he learned the importance of planning for the future to create certainty and clarity in the present. Since joining Northwestern Mutual in 1997, Unterreiner has spent 28 years building a practice that rooted in listening to clients’ hopes, dreams, and aspirations. His approach to financial planning is deeply personal, ensuring that each client has a tailored strategy to achieve their best future – personally, professionally, and financially. This commitment to client-focused planning, combined with his expertise in philanthropy, makes him an invaluable addition to the Socium Advisors team.

“I’m eager to join the incredible team at Socium Advisors and to contribute to the firm’s growth, particularly in the area of philanthropy,” said John. “Having spent my career helping clients plan for their futures, I’m looking forward to focusing even more on creating meaningful, lasting impact through charitable giving.”

Socium Advisors is one of the largest investment management practices at Northwestern Mutual and manages more than \$1.5 billion in assets* with offices in St. Louis, Mo., Fayetteville, Ark., and McLean, Va., outside Washington, D.C.

For more information about Northwestern Mutual, visit <http://www.northwesternmutual.com/> or visit the Socium Advisors’ website for more info on the firm.

** As of April 2024. Figure refers to assets under management as wealth management advisors of Northwestern Mutual Wealth Management Company.*

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.

Barron’s “Top 1,200 Financial Advisors” list (March 2024, March 2023, 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 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 assets¹ 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.

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