

FOR IMMEDIATE RELEASE

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A recognized expert in wealth management with 30+ years of experience and \$400M in AUM, Calvert will drive strategic growth and client success

Los Angeles – April 2, 2025 – Socium Advisors – a Private Client Group of Northwestern Mutual with 2.2B in AUM – announces the addition of John Calvert as Partner and Wealth Management Advisor, furthering the firm’s commitment to guiding clients toward prosperous futures and multigenerational planning. Based in the Los Angeles office, Calvert brings over 30 years of experience in wealth management and \$400M in Assets Under Management (AUM)¹, underscoring the firm’s dedication to strategic growth and top-tier market value. Leveraging his extensive expertise, Calvert will specialize in helping clients navigate estate and legacy planning and developing exit strategies for business owners.

“The care John shows for his clients is evident in the deeply intentional services he provides, making him an invaluable addition to Socium Advisors,” said Scott Underwood, founder and CEO of Socium Advisors. “John’s focus on strategic planning and helping clients manage complex financial decisions will be a tremendous asset to our team and the individuals and business owners we serve. We look forward to the impact he will make as we continue to provide exceptional guidance and service throughout the Los Angeles financial community and beyond.”

Calvert’s ability to address the full range of his clients’ needs, and help guide them through significant growth, comes with a seasoned career in wealth management, beginning at Northwestern Mutual shortly after graduating from Boston College. He was drawn to the field by its emphasis on intentional planning and the intellectual demands of staying ahead in a constantly evolving industry, with demonstrated success and recognition, including being named a Forbes Best-in-State Wealth Advisor for the last three years.

“I’ve always held integrity as one of my deepest values, and it’s become clear to me that Socium Advisors shares that commitment. I’m excited to bring to my clients the extensive resources and services at Socium, and even more so to be part of a team dedicated to both personal and professional growth,” said Calvert. “Socium has cultivated a culture of excellence, focused on delivering top-tier service and helping clients create lives of true significance. After more than 30 years in this business, my clients’ needs have evolved, their longevity needs have changed, and I’m committed to our continued evolution alongside them.”

In his first year at Socium Advisors, Calvert is focused on expanding his expertise in estate planning and business succession to best serve his clients and the Socium team. A member of the Financial Planning Association and the Society of Financial Service Professionals, he helped establish and teach in the CFP® Certification Program at California State University – Los Angeles. He furthermore co-authored *A is for Agenda—The Importance of Good Retirement Plan Governance* in the *Journal of Pension Benefits*.

¹ As of 02/28/2025. Figure refers to assets under management as a wealth management advisor of Northwestern Mutual Wealth Management Company.

Outside of work, Calvert is deeply involved in his church and community. He is a parish lector; a coach, referee and board member for AYSO Region 71; an alumni board member for Loyola High School; an alumni volunteer for Boston College; and a board member (and former chair) of the Ketchum-Downtown Los Angeles YMCA. In his free time, he enjoys spending time with his wife, two daughters, son, and son-in-law.

About Socium Advisors

Socium Advisors, a leading Northwestern Mutual wealth management firm headquartered in St. Louis, is dedicated to building genuine partnerships with clients, guiding them toward prosperous futures through outcome-based and long-term goal planning. With offices in Fayetteville, Arkansas, Los Angeles, McLean, Virginia and Tacoma, Washington, the firm takes a comprehensive approach to wealth management, focusing on seven interconnected components that are vital to a complete financial blueprint. Recognized as an industry leader, the firm was named in Barron's "Top 1,200 Financial Advisors" from 2019 to 2025 and has \$2.2B assets under management to-date. Socium Advisors supports [local communities](#) through contributions to various non-profits and educational institutions, including the American Cancer Society, Lydia's House, Ronald McDonald House Charities, Shooting with Chefs and more.

For more information, reach out to Socium Advisors at <https://sa.nm.com/contact.htm>.

John Calvert can be reached at <https://www.northwesternmutual.com/financial/advisor/john-calvert/>.

Barron's "Top 1,200 Financial Advisors" list (March 2025, 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.

Forbes "Best-in-State Wealth Advisors" list (April 2025, April 2024, April 2023, April 2022, February 2021), Research and ranking provided by SHOOK Research, LLC. Based upon data as of June 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.

To learn more, please visit www.northwesternmutual.com/financial/advisor/john-calvert

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