Northwestern Mutual

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Shawn Phelps Named a Forbes Top Financial Security Professional

October 19, 2021 – River Tree Wealth Management of Northwestern Mutual is pleased to announce Founder and Partner, Shawn Phelps has been named a 2021 Forbes Top Financial Security Professional.

“Our team’s holistic approach to financial planning is designed to form lasting partnerships with our clients and help them achieve their long-term financial goals,” said Shawn Phelps. “It’s an honor to be included in Forbes’ Top Financial Security Professionals list, and to see such strong Northwestern Mutual representation.”

Northwestern Mutual advisors represent more than one quarter of the honorees within Forbes's ranking, significantly outpacing all other wealth management and financial services firms.

The Forbes list honors the nation's top-performing wealth advisors who provide holistic planning focusing on highly skilled financial guidance and risk mitigation. Honorees are selected based on a set of key criteria including industry experience, revenue, assets under management, client loyalty – also known as persistence rate – as well as qualitative factors like compliance record and the exhibition of best practices.

A leading advisor in Ohio, Shawn Phelps began his career with Northwestern Mutual in 2010.

Shawn Phelps’s practice focuses on serving multi-generational families and businesses, specializing in trust and estate planning.

Shawn Phelps uses River Tree Wealth Management as a marketing name for doing business as a representative of Northwestern Mutual. River Tree Wealth Management is not a registered investment adviser, broker-dealer, insurance agency or federal savings bank. Shawn W Phelps is an Insurance Agent of The Northwestern Mutual Life Insurance Company, and Northwestern Long Term Care Insurance Company, Milwaukee, WI. Investment brokerage services provided as a Registered Representative of **Northwestern Mutual Investment Services, LLC, Milwaukee, WI**. Investment advisory services provided as an Advisor of Northwestern Mutual Wealth Management Company, Milwaukee, WI For more information, please visit www.rivertree-wealth.com

About Northwestern Mutual

Northwestern Mutual has been helping people and businesses achieve financial security for more than 160 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 $308.8 billion in total assets, $31.1 billion in revenues, and $2 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to more than 4.75 million people with life, disability income and long-term care insurance, annuities, and brokerage and advisory services. The company manages more than $200 billion of investments owned by its clients and held or managed through its wealth management and investment services businesses. Northwestern Mutual ranks 90 on the 2021 FORTUNE 500 and is recognized by FORTUNE® as one of the “World’s Most Admired” life insurance companies in 2021.

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).

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