RIVER TREE
WEALTH MANAGEMENT | NORTHWESTERN MUTUAL
PRIVATE CLIENT GROUP

FOR IMMEDIATE RELEASE

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River Tree Wealth Management Joins Northwestern Mutual Private Client Group

COLUMBUS – May 22, 2023 – River Tree Wealth Management, a leading financial planning firm in Columbus, Ohio has joined Northwestern Mutual's Private Client Group. The group provides an elevated wealth management experience for individuals and families with significant means.

"We pride ourselves in a reality-grounded, growth-minded approach to help people live their best lives. Our clients feel confident and a willingness to trust, because we provide highly educated options and are truly accessible when they need us the most," says Founder and Private Wealth Advisor, Shawn Phelps. "And we have fun doing it!"

River Tree Wealth Management specializes in complex estate planning, charitable giving, business succession, risk management, investment solutions, and retirement planning.

Phelps joined Northwestern Mutual – Columbus in 2010 as a financial advisor. He earned his BBA and MBA from Ashland University and his Trust and Estate Planning degree from Bowling Green University. In 2013, co-founder, Brandee Wyzlic, joined Phelps at Northwestern Mutual. River Tree Wealth added three, experienced partners in 2022: Matthew Beeghley, CFP®, ChFC®, RICP®, CLU®, CAP®, MBA; Kayla Hinds, CFP®, CLU®; and Justin Fickes, M. Ed.

Like a river tree that acts as a hub for its environment, the partners focus on powerfully impacting their community. Last year, they sponsored numerous events throughout Ohio as well as contributed to several, international philanthropic causes. The team actively volunteers: two working days a year together and individually via a variety of organizations.

Visit Northwestern Mutual's Private Client Group to learn more.

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 more than $558 billion of total assets being managed across the company's institutional portfolio as well as retail investment client portfolios, nearly $35 billion in revenues, and $2.2 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 97 on the 2022 FORTUNE 500.

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.**

Matthew E Beeghley, Justin P Fickes, Kayla C Hinds, Shawn W Phelps, Daniel J Matheny and Brandee S Wyzlic use River Tree Wealth Management as a marketing name for doing business as representatives of Northwestern Mutual. River Tree Wealth Management is not a registered investment adviser, broker-dealer, insurance agency or federal savings bank. Visit rivertree-wealth.com for more information.

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