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Northwestern Mutual Welcomes P.J. McDaniel to Socium Advisors

McDaniel joins Socium as Chief Growth Officer after more than 20 years in financial services

St. Louis, MO – December 15, 2023 – Northwestern Mutual, a leading financial services company, is proud to announce P.J. McDaniel has joined St. Louis-based Socium Advisors as the firm's first Chief Growth Officer. McDaniel officially joined Socium on October 1st and is responsible for business development and overseeing mergers and acquisitions.

"We at Socium are thrilled to welcome P.J. to Socium Advisors, Northwestern Mutual and our team," said Scott Underwood, Founder and CEO of Socium Advisors. "P.J. has a proven record of success helping firms reach and surpass their goals, which is a testimony to his work and vast knowledge of the industry. We are excited for the continued growth of Socium with P.J. joining our firm."

McDaniel has held C-suite leadership roles at a number of financial services institutions in his 20-plus years within the finance industry. Most recently, McDaniel was a partner in 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. McDaniel credits his career success to his unique background of understanding the landscape for financial advisors, understanding the growing needs of clients and developing organic growth.

"Joining Socium is an opportunity to drive growth and success for the firm, but also an opportunity to make a positive impact on our clients and their financial well-being," said McDaniel. "I was impressed with the capabilities and value-added services along with a deep bench of talent that Socium provides their clients. My goal is to shine a spotlight on our growing team of hard-working professionals. I'm looking forward to supporting our firm by helping to provide custom solutions, building trust, and creating financial security for both individuals and businesses."

Socium Advisors is one of the largest investment management practices at Northwestern and manages more than \$1.4 billion in assets with offices in St. Louis, MO, Fayetteville, AR, 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.

About Northwestern Mutual

Northwestern Mutual has been helping people and businesses achieve financial security for more than 165 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 more than \$570 billion in combined company and client assets, \$34 billion in revenues, and \$2.1 trillion worth of life insurance protection in force, Northwestern Mutual delivers financial security to nearly 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 and was recognized by FORTUNE® as one of the "World's Most Admired" life insurance companies in 2022.

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.**

About Socium 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 Baron's "Top 1200 Financial Advisors" in 2019, 2020, 2021 and 2022. Barron's "Top 1,200 Financial Advisors" list (March 2023, March 2022, March 2021, March 2020), 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.

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