Northwestern Mutual

CAPITALIS PLANNING PARTNERS

NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP

FOR IMMEDIATE RELEASE

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Capitalis Planning Partners Joins Northwestern Mutual Private Client Group

LOUISVILLE, KY – APRIL 13, 2023 – Capitalis Planning Partners, a leading financial security company in Louisville, KY, has joined Northwestern Mutual's Private Client Group. The group provides an elevated wealth management experience for individuals and families with significant means.

Capitalis Planning Partners serves business owners, professionals, and executives by collaborating on a global strategy for their businesses and personal finances. Capitalis Planning Partners specializes in comprehensive financial planning and asset management for high-net-worth families and individuals across 44 states.

Capitalis Planning Partners was founded by Mark Kull. At age 19, Mark began his career with Northwestern Mutual as an intern. Finishing strong in his senior year, he ranked 2nd in the country out of 1,700 interns. After graduation from the University of Louisville College of Business in 2006, he established his full-time practice with Northwestern Mutual. In 2021, Mark launched Capitalis Planning Partners as a national brand.

Mark is a CFP® certificate holder, along with having the CLU®, ChFC®, RICP®, and CASL® designations from the American College. A highly sought-after industry speaker, Mark has spoken to over 45 Northwestern Mutual offices across the country, covering a range of topics. He has also been featured in *Forbes*, *TOPS Magazine*, *Louisville Business First* and other industry publications. Mark has also been recognized as a Best-In-State Wealth Advisor and a Top Financial Security Professional by *Forbes*.

Capitalis Planning Partners is also led by Director of Investments Jason Sterrett, CFA®, CFP®, CPA, and Chief Operating Officer David Hise, J.D. By having experts across disciplines, clients rely on Capitalis Planning Partners to coordinate with other professionals across their financial lives to ensure a comprehensive execution of their financial plan.

Mark Kull, on joining Private Client Group, said "Capitalis Planning Partners is extremely proud to have joined the Private Client Group. We have always had a long-term focus, and our focus is on helping clients build an enduring legacy from working with an enduring firm. Our team at Capitalis Planning Partners works with all generations of your family to help protect and preserve what you've worked so hard for. We get excited about how our work will positively impact future generations that we may never meet."

Visit www.cpp.nm.com and 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.**

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