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For further information, contact:
David N. Hise, Chief Operating Officer
Capitalis Planning Partners
(859) 576-5312
David.N.Hise@nm.com

Capitalis Planning Partners acquires Meyer Financial

LOUISVILLE, KY – January 9, 2025 – Capitalis Planning Partners, a leading financial security company in Louisville, KY, has acquired Meyer Financial, a Louisville-based financial planning and wealth management practice affiliated with Northwestern Mutual and led by Grant Meyer, MBA, CFP®, RICP®, ChFC®.

Meyer, a private wealth advisor, will continue to serve his clients through Capitalis, a member of the Northwestern Mutual Private Client Group that serves individuals, families, businesses and nonprofits in 44 states.

“Capitalis is highly selective in evaluating potential growth opportunities, and we are so excited to welcome Grant Meyer and the clients of Meyer Financial to Capitalis Planning Partners,” said Capitalis founder and CEO Mark Kull, CFP®, ChFC®, CLU®, CASL®, RICP®. “Grant built an incredible financial planning practice focused on medical professionals, business owners and their families over the past eight years, and now, he will continue to provide the same exceptional service to his clients with the full support of the Capitalis team.”

Capitalis is led by Kull, who has been repeatedly recognized by Forbes on its Best-In-State Wealth Advisors list (2024) and Top Financial Security Professionals Best-in-State lists (2023-2024)*; Jason Sterrett, CFA®, CFP®, CPA, a partner and director of investments; and David Hise, J.D., CFP®, partner and chief operating officer. Including Meyer, Capitalis’ nine team members hold 21 designations and professional licenses with decades of combined financial experience.

“I look forward to leveraging the strength of the Capitalis team to give my clients the confidence and freedom to enjoy life while trusted, experienced professionals look out for their financial future,” said Meyer. “Our philosophies of client service were already closely aligned, with commitments to advise and care for clients as a team and use our specialized skills, knowledge and abilities to serve in their best interests. I expect our new relationship to propel our practice to the next level.”

“We have always had a long-term focus to help clients build an enduring legacy by working with an enduring firm,” said Kull. “Capitalis works with all generations of a family to help grow, protect and preserve what they’ve worked so hard for, and we get excited about how our work will positively impact future generations that we may never meet.”

* Forbes Best-in-State Wealth Advisors list (April 2024), based upon data as of 6/30/2023. Forbes Top Financial Security Professionals Best In State list (July 2023,2024), based upon data as of December 31st of the preceding year. Research and rankings provided by Shook Research, LLC. 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 or ranking(s). Rankings and recognitions are no guarantee of future investment success.

Capitalis Planning Partners is used as a marketing name for certain individuals doing business as representatives of Northwestern Mutual. Capitalis Planning Partners is not a registered investment adviser, broker-dealer, insurance agency or federal savings bank. Visit www.cpp.nm.com to learn more about Capitalis Planning Partners.

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 assets[i] 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 111 on the 2023 *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.**

[i] Includes investments and separate account assets of Northwestern Mutual as well as retail investment client assets held or managed by Northwestern Mutual.

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