Advanced Planning team

The Advanced Planning team is a group of experts who consult and train on complex business, estate, and retirement planning and product matters. Advanced Planning consults with our financial representatives on their clients' cases, provides training on advanced topics, and creates tools and resources that help our clients achieve their planning goals.

Thomas R. Anderson, JD, CFP®
Senior Director – Advanced Planning

Year joined: 1990

Company highlights: Focuses on helping advisors with estate planning, retirement planning, business planning and high net worth cases.

Prior experience: Over 25 years of financial services experience, including acting as trust officer at JPMorgan Chase.

Education: St. Cloud State University (bachelor's degree in psychology); Hamline University Law School.

Patrick J. Bodden, JD
Vice President – Advanced Planning

Year joined: 2014

Company highlights: Leads the Advanced Planning team; expertise in business transactions and estate planning strategies.

Prior experience: Private practice attorney at two law firms: von Briesen & Roper, s.c. and Ruder Ware L.L.S.C.

Education: University of Wisconsin – Milwaukee (B.B.A. in finance & real estate); Marquette University Law School.

Kelley S. Daugherty, JD

Senior Attorney – Advanced Planning

Year joined: 2021

Company highlights: Consults with the field on estate planning and tax issues.

Prior experience: Private practice attorney at Godfrey & Kahn specializing in estate planning and administration, and researched grantmaking strategies for a local philanthropist.

Education: Michigan State University (bachelor's degree in interdisciplinary humanities); University of Wisconsin Law School.

Marie-Claire A. Hart, JD, MPA
Senior Attorney – Advanced Planning

Year joined: 2020

Company highlights: Consults with the field on estate planning and tax issues.

Prior experience: Worked as Financial Planning & Consulting's estate planning subject matter expert. Prior to joining Advanced Planning, worked on two Forum-qualifying teams creating high-net worth financial plans for 6 years.

Education: Texas Christian University (bachelor's degree in political science); University of North Texas (master's degree in public administration); Texas A&M University School of Law.

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Patrick J. Horning, JD, CLU®, CFP®
Senior Director – Advanced Planning

Year joined: 2000

Company highlights: Expertise in planning for non-citizens, the tax valuation of life insurance, and tax legislation; leads the Advanced Planning Presents webinars; member of Northwestern Mutual's Tax Policy Committee.

Prior experience: Practiced at a local law firm, specializing in business and real estate law.

Education: Marquette University (bachelor's degree in history and political science); Marquette University Law School.

Matthew W. Johnston, JD, MST, CLU®, CFP®
Senior Director – Advanced Planning

Year joined: 2014

Company highlights: Helps NM develop and enhance its estate and business planning tools.

Prior experience: Worked at Baker Tilly's Private Client Group; focusing on estate planning, business exit planning, trust and gift tax.

Education: University of Wisconsin – La Crosse (bachelor's degree in finance with an accounting minor); University of Wisconsin – Milwaukee (M.S. in taxation); University of Wisconsin Law School.

Brian Lamborne, JD, LLM
Senior Director – Advanced Planning

Year joined: 2022

Company highlights: Consults with the field on business and estate planning matters.

Prior experience: Worked for a national financial firm consulting with advisors regarding business, estate and income tax planning strategies. Prior to that, worked for a national consulting firm providing income tax, estate planning and asset protection strategies to small and mid-size business owners.

Education: Albion College (BA in Psychology), Roger Williams University School of Law, University of Washington School of Law (LLM in Taxation).

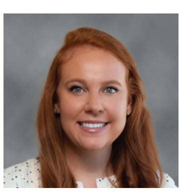
Daniel P. McLennon, JD, CLU®, CFP®
Senior Attorney – Advanced Planning

Year joined: 2014

Company highlights: Expertise in education planning, including speaking and writing on 529 accounts and student loan strategies.

Prior experience: Worked as a bankruptcy attorney in Milwaukee.

Education: Kenyon College (bachelor's degree in mathematics); Marquette University Law School.



Bridget F. Murphy, JD
Attorney – Advanced Planning

Year joined: 2021

Company highlights: Consults with the field on estate planning and tax issues.

Prior experience: Private practice attorney at a local firm, specializing in estate planning and elder law.

Education: Marquette University (bachelor's degree in Economics and Political Science); Marquette University Law School.

John E. Muth, JD, AEP®, CLU®, CFP®
Senior Director – Advanced Planning

Year joined: 1996

Company highlights: Works closely with NM's experts in business exit planning and estate planning strategies. Engaged in advanced market education for NM Financial Advisors with NM webinars and moderates the Professional Growth Association (PGA) Sessions at Regional and Annual Meetings.

Prior experience: At NM, worked as a compliance director and advisor for field supervision and regulatory matters. Prior to NM, worked as a financial advisor for a national financial services firm, and later worked as a corporate attorney for a health insurance company.

Education: University of Santa Clara (bachelor's degree in history); Marquette University Law School.

Phillip A. H. Roemaat, JD, CPA, CLU®, CFP®, RICP®, ChFC®
Senior Director – Advanced Planning

Year joined: 2015

Company highlights: Focuses on helping advisors through Advanced Planning's Field consultations; expertise in income tax planning for businesses and their owners.

Prior experience: Private practice at a public accounting firm, Baker Tilly Virchow Krause, LLP focusing on income tax planning and compliance for high net worth individuals, closely held businesses, and business owners.

Education: University of Wisconsin – Madison (B.B.A. in finance and economics); Marquette University Law School.