

Northwestern Mutual Invites You to Take Advantage of Advanced Planning Resources

The Northwestern Mutual Advanced Planning team provides valuable resources that are tailored exclusively for professionals serving clients with sophisticated, complex planning needs. Our audience includes financial advisors, attorneys, accountants, and trust officers. Our attorneys deliver deep legal expertise and guidance that will enable you to confidently serve your clients.

Advanced Planning Resources Cover Sophisticated Planning Topics

- Business planning, including buy-sell and split dollar
- Estate planning, including life insurance trusts
- Retirement planning, including RMDs and inherited IRAs
- Income tax planning and financial planning

Accessing Advanced Planning Resources

Contact your Northwestern Mutual financial advisor for complimentary access to the Advanced Planning Library and the Advanced Planning Bulletin.

To set up a complimentary phone consultation with your Northwestern Mutual Financial Advisor and an Advanced Planning attorney, contact your financial advisor. Sorry, but clients cannot be on the call.

Types of Resources We Offer

- Comprehensive online library with a variety of resources covering current tax developments and planning ideas
- Pieces with graphics and easy-to-understand language that are tailored to explain complex ideas to clients
- In depth pieces for attorneys, accountants, and trust officers that provide legal and tax analysis on product and planning strategies
- Sample legal agreements for attorneys on trusts, buy-sell arrangements, deferred compensation plans, executive bonus, and more
- Advanced Planning Bulletin published quarterly that contains timely articles on recent IRS rulings, tax law changes, court decisions, and planning strategies.
- Phone consultations: Advanced Planning attorneys are available for conference calls between a Northwestern Mutual financial advisor and a client's attorney, accountants, trust officer, or other advisor to discuss a case or answer questions.

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