



Barry and Jackie Posner are building their secure tomorrows with Northwestern Mutual and its affiliated companies through:

- *Life insurance*
- *Disability insurance*
- *Long-term care insurance*
- *Deferred variable annuities*
- *Brokerage accounts*
- *Investment advisory program accounts*
- *Financial planning*

Barry Posner, Ph.D., and Jackie Schmidt-Posner, Ph.D. | SANTA CLARA, CALIFORNIA

He is a nationally acclaimed author and speaker, not to mention dean of the Leavey School of Business at Santa Clara University. She is the interim director of Stanford University's Haas Center for Public Service.

Even with Barry's credentials, the Posners have relied for decades on Northwestern Mutual Wealth Management Advisor Alan Spiegelman, CLU, ChFC, AEP, to help manage their financial security. As a Wealth Management Advisor, Alan offers insurance products, investments, wealth management and trust services through Northwestern Mutual and its affiliated companies.*

"Alan respects my business background, but I've learned a lot through him," says Barry. "He offers an invaluable perspective and, quite frankly, more expertise overall than I have on this subject. There have been times when he's told us that we don't need a certain product because it was not an appropriate fit. Such candid guidance is refreshing. Simply put, we rely on Alan because we don't want to worry about the financial aspect of our lives."

The Posner's trust in Alan was borne out when a skiing accident left Barry with a crushed femur. "When we

submitted our claim for disability income," he explains, "we found out just what Northwestern Mutual and Alan mean when they make promises about good service. The company's timely response during this difficult time continues to reassure us today."

Barry and Jackie rely on Alan and Northwestern Mutual for more than just risk protection, however. With Barry's speaking fees and book royalties, their retirement preparation is complex.

Moreover, the Posners are committed to socially responsible investing. They look to Alan and Northwestern Mutual to help them carry out these investment values. "Through our resources and our work in education, we hope to make others more powerful so they can make a real difference in the world," Jackie explains. "We appreciate Alan's efforts to help us find companies and vehicles that share that point of view."

**The investment advisory services described here are offered to the Posners by Northwestern Mutual Wealth Management Company, a limited purpose federal savings bank regulated by the Office of Thrift Supervision.*

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