

# PRIVATE CLIENT SERVICES INVESTMENT TEAM

NORTHWESTERN MUTUAL WEALTH MANAGEMENT COMPANY®



## **Brent Schutte, CFA®**

Chief Investment Strategist –  
Northwestern Mutual Wealth  
Management Company

Brent has more than 20 years of investment industry experience. Prior to joining Northwestern Mutual in 2015, he served as senior investment strategist and portfolio manager at BMO Global Asset Management in Chicago. In this role, Brent provided global tactical asset allocation research and recommended top-down portfolio strategies. He managed the firm's multi-asset income fund, diversified income strategy, strategic fund portfolios and Canadian tactical funds. Brent communicated the firm's investment viewpoints, making regular appearances as a television guest and media contributor. He holds a bachelor's degree in finance from University of Illinois at Urbana-Champaign and an MBA with high honors from the University of Chicago Booth School of Business. Brent is a member of Beta Gamma Sigma International Honor Society.



## **Gerald E. Fradin, JD**

Vice President – Investment Management

Jerry has 24 years of financial services experience as an attorney representing financial institutions and investment advisors. From 2007 to 2012, Jerry was the principal attorney for Northwestern Mutual Wealth Management Company and secretary to its board of directors. Prior to joining Northwestern Mutual, Jerry was a partner at Sonnenschein Nath & Rosenthal LLP in Chicago, where he practiced law for 16 years as a member of the firm's litigation and business regulation group. Jerry holds a bachelor's degree in political science from the University of Illinois. He received his J.D. in 1990 from the University of Pennsylvania Law School.



## **Derek L. Tyus, CFA®**

Director – Private Client Services

Derek has 20 years of investment experience. He joined Northwestern Mutual in 1997 and was promoted to director in 2001. In 2005, he was appointed director of strategic analysis and planning. Derek joined Northwestern Mutual Wealth Management Company in 2011. Previously, Derek was a tax accountant at Arthur Andersen and a financial analyst project supervisor at S.C. Johnson. Derek holds a bachelor's degree in accounting from Marquette University and an MBA in finance from the University of Michigan.



## **Christopher Bremer**

Director – Private Client Services  
Portfolio Management

Chris has 14 years of investment and portfolio management experience. Prior to joining Northwestern Mutual Wealth Management Company, he was a senior analyst and portfolio manager for high-net-worth and family office clients with Atlantic Trust. Chris also served on the firm's investment committee, providing guidance on strategic asset allocation and investment policy decisions. Chris holds a bachelor's degree from Denison University and a master's degree from Boston University.



## **Stephen C. Coleman, CFA®**

Chief Portfolio Manager – Fixed Income

Steve has 37 years of fixed income investment experience in both the taxable and tax-exempt sectors. Steve headed fixed income investments for Wausau Insurance Companies and GNA Corporation, a former subsidiary of the Weyerhaeuser Company. He then held the position of senior vice president and portfolio manager with Investment Advisors Inc., where he also managed fixed income mutual funds. Steve has a bachelor's degree in business from the University of Iowa and an MBA from the University of Wisconsin – Madison.



## **Michael A. Helmuth**

Chief Portfolio Manager – Fixed Income

Mike has 13 years of fixed income investment experience. He served as vice president of Institutional Fixed Income at Stone and Youngberg. Prior to that, he was director of proprietary trading at Deutsche Bank in Chicago, where he developed a municipal arbitrage desk for proprietary trading and traded municipal bonds, taxable fixed income and other products, options and instruments. He was also a fixed income portfolio manager at Stark Investments. Mike holds a bachelor's degree in business from the University of Wisconsin – Stevens Point and an MBA from Marquette University.



**Steven C. Meves, CFA®**

Senior Portfolio Manager –  
Private Client Services

Steve has 15 years of investment experience. Steve served as a vice president for institutional relationships and as an analyst at M&I Investment Management. Prior to that, he was an assistant vice president and portfolio analyst at Robert W. Baird & Co., where he developed a quantitative manager ranking system for manager selection. Steve holds a bachelor's degree in business from the University of Wisconsin – Madison and an MBA from the University of Chicago Booth School of Business, concentrating in accounting, finance and entrepreneurship.

**Maclovio Vega, CFA®**

Portfolio Manager – Private Client Services

Maclovio has 16 years of investment experience, including eight years focused on fixed income in both the taxable and tax-exempt sectors. Prior to joining Northwestern Mutual Wealth Management Company in 2007, Maclovio held roles at Firststar/US Bank, where he co-managed the money market funds, and Cleary Gull Inc., where he was responsible for the fixed income portion of client separately managed accounts. Most recently he co-managed both taxable and tax-exempt fixed income assets for Campbell Newman Asset Management. Maclovio holds a bachelor's degree in finance from Marquette University.

**Daniel J. Adams**

Portfolio Manager – Private Client Services

Dan has 18 years of investment experience. Prior to joining Northwestern Mutual Wealth Management Company in 2005, Dan served as portfolio strategist for Midwest Professional Planners, where he oversaw more than \$70 million in non-discretionary client assets. He then served as financial planning manager for Robert W. Baird & Co. Dan holds a bachelor's degree in finance from the University of Wisconsin – La Crosse and an MBA from the University of Wisconsin – Oshkosh.

**David Andrzejewski**

Portfolio Manager – Private Client Services

David has 14 years of investment experience. Prior to joining Northwestern Mutual Wealth Management Company, he served as assistant director – managed investment compliance at Mason Street Advisors, where he worked closely with portfolio managers and traders to build efficient trading procedures and ensure compliance. David holds a bachelor's degree in accounting from the University of Wisconsin – Milwaukee.

**Garrett D. Aird, CFA®**

Assistant Director – Investment Research

Garrett has 14 years of investment experience and has been with Northwestern Mutual since 2002. Prior to joining Northwestern Mutual Wealth Management Company in 2007, Garrett was part of the annuity products team, where he focused on industry research and product development. He also spent two years with Strong Investments. Garrett holds a bachelor's degree in business administration from the University of Wisconsin – Milwaukee.

**Matthew P. Stucky, CFA®**

Portfolio Manager – Private Client Services

Matt joined Northwestern Mutual Wealth Management Company in 2011 after earning a master's degree in finance from Vanderbilt University. Matt also holds a bachelor's degree in finance from Valparaiso University. Prior to joining Northwestern Mutual Wealth Management Company, Matt worked for Northwestern Mutual as a financial representative intern with the Rapp Network Office in Fort Wayne, Ind.

**Michael A. DiCastrì, CMFC**

Senior Investment Consultant

Mike has 18 years of investment experience. Prior to joining Northwestern Mutual Wealth Management Company, Mike was an equity and quantitative analyst with Johnson Asset Management. In this role he was responsible for equity sector analysis in the retail, consumer staples, real estate investment trust and building areas. Mike was also a senior trust operations officer with Johnson Trust Company and a mutual fund trader with Marshall & Ilsley Trust Company. Mike holds bachelor's and master's degrees in economics from the University of Wisconsin – Milwaukee.

**Peter J. Sauer**

Investment Research Analyst

Peter joined Northwestern Mutual Wealth Management Company in 2008 after earning a bachelor's degree in finance from Saint Louis University. Peter served as a college intern for Northwestern Mutual Wealth Management Company during the summer of 2007. Prior to that, he was an assistant to a Northwestern Mutual financial representative in the Schwertfeger (now Holter) Network Office in Milwaukee, Wis.



**Stefanie Jordan**

Investment Research Analyst

Stef joined Northwestern Mutual Wealth Management Company in 2015 after completing a college internship in Private Client Services, which she began in 2014. Prior to this, Stef was an intern with Mason Street Advisors in public fixed income. Stef works closely with the equity and fixed income portfolio managers and contributes to multiple teams with mutual fund research. Upon her completion of the Applied Investment Management (AIM) Program, Stef earned a bachelor's degree in finance from Marquette University.

**Maria Cornejo**

Senior Portfolio Specialist

Maria has been with Northwestern Mutual since 2007. Prior to joining Northwestern Mutual Wealth Management Company, Maria served as a college intern for Northwestern Mutual's law department during the summer of 2006. Maria works closely with the portfolio managers to support the delivery of a discretionary investment capability for the PCS clients. Maria holds a bachelor's degree from Mount Mary College, where she studied business and accounting, and an MBA from Alverno College.

**Seyda Marmara**

Portfolio Management Consultant

Seyda has 15 years of investment experience. Prior to joining Northwestern Mutual Wealth Management Company in 2008, Seyda worked at Firststar/US Bank Mutual Fund Services, where she built her knowledge of transfer agency services. Most recently, she worked at Baird Investment Management, providing operational and trade support for their equity investment strategies. Seyda holds a bachelor's degree in economics from the University of Wisconsin - Milwaukee.

**Kathryn Burns**

Investment Product Consultant

Kathryn has 18 years of investment experience. Prior to joining Northwestern Mutual Wealth Management Company, Kathryn held roles at Northwestern Mutual Investment Services as a systems and projects consultant, at UMB Investment Services as an operations manager in mutual fund accounting and administration, and at US Bank as a supervisor in the mutual fund accounting department. Kathryn holds a bachelor's degree in business management from Alverno College.

**Matthew L. Pritchard**

Senior Portfolio Specialist

Matt joined Northwestern Mutual Wealth Management Company in 2010 after completing a college internship in advisory and trust services, which he began in 2008. In addition to responsibilities for portfolio management support and analysis, Matt has supported wealth management advisors' business development through the delivery of the firm's Private Client Services program. Matt holds a bachelor's degree from the University of Wisconsin - Milwaukee, where he studied business and economics.

**Rebecca Fisher**

Trust and PCS Sales Senior Specialist

Becky has been with Northwestern Mutual since 2007. After completing her internship with Northwestern Mutual Wealth Management Company in 2008, she worked in long-term care claims and field distribution policies and administration. Becky joined the Northwestern Mutual Wealth Management Company again in 2014, and she now works closely with the portfolio management and account administration teams. Becky holds a bachelor's degree from the University of Wisconsin - Milwaukee, where she studied finance.



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