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Backed by Legendary Company, Client-Driven Financial Team Serves Holistic Needs

BROTHER-SISTER DUO LEADS A BOUTIQUE TEAM THAT SETS A HIGH BAR FOR WORLD-CLASS SERVICES WITH A MIDWESTERN APPROACH.

Forrester Wealth Management of Northwestern Mutual makes two promises when a client walks through their doors. First, they will always be honest and sincere. Second, they will never make a financial recommendation they wouldn't make for themselves.

This level of trust and commitment has built a solid foundation for long-term client relationships over the past two decades.

Started by Katherine Forrester Schneewind in 1996, the firm welcomed her brother, Michael Forrester, as an associate partner in 2010 following his 10-year tenure running a real estate consulting firm.

Today, the firm boasts a 10-member team that has been "hand-picked based on their moral fabric and specific expertise," says Schneewind. The firm offers the full gamut of fee-based financial planning services—as well as retirement, estate and tax-efficient strategies, and insurance and asset management—and is backed by the 161-year-old company with $250.4 billion in assets, Northwestern Mutual.

Because Forrester Wealth Management understands the unique challenges faced by business owners, a large part of the team's expertise is in helping business owners manage risk and secure personal wealth for their families.

The recent addition of Kyle Didier, a CPA, former President and CFO, and long-time client of the firm, is yet another step toward the firm's vision of becoming one of the best holistic, multigenerational financial planning firms in the country—a dream that is already well underway.

Kyle Didier, Associate Financial Representative; **Katherine Forrester Schneewind**, Wealth Management Advisor; **Michael Forrester**, CFA®, CFP®, Associate Wealth Management Advisor

CLIENTS LIKE FAMILY

There's a box of tissues in the conference room at Forrester Wealth Management, but it's not for sad tears. "Tears are occasionally shed by clients saying thank you and being grateful for helping them understand and optimize their finances in a way that feels peaceful and collaborative," Schneewind says.

The firm is selective with respect to the size of its client base to ensure each receives high-touch personal wealth management. Clients of the firm are high net worth but come from all walks of life—from rising young professionals to successful business owners.

"We attract individuals who share our values and appreciate the high level of service we deliver in customizing big-picture plans," Forrester says. "It's important to us that our clients' missions align with our own. We want to work with clients who value long-term relationships and doing good for others."

LEGACY IN THE MAKING

As brother and sister, Forrester and Schneewind's partnership is unique from a sibling as well as a gender perspective. Clients benefit from both male and female points of view that "add a valued frame of reference to help them make the best financial decisions," says Schneewind.

With 20 years' experience and at least 20 more ahead of them, Forrester says, "We've got enough experience and expertise to be extremely valuable, but we're young enough to be sustainable going forward."

A large part of the firm's legacy is its dedication to supporting worthy causes—both financially and with volunteer hours. One such organization is Vivienne's Joy Foundation, the nonprofit founded by a dear client who endured a tragic loss.

"Community involvement is very important to us," says Schneewind, who is very active with her own family foundation. "We're proud to have supported more than 10 organizations this year, and we look forward to supporting many more in the future."

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Forrester Wealth Management of Northwestern Mutual is located at 18258 Minnetonka Boulevard, Suite 200, Deephaven, MN 55391. For more information, call **952-224-7970** or visit **forrester.nm.com**.