Northwestern Mutual® | Field Shared Services

Operations & Planning Suite

# PLANNING & WEALTH CONSULTING

# Meet the Team

**Mary Lee Odem, CLU®, ChFC®, CASL®, RICP®, CLTC®**
**Assistant Director – Planning & Wealth Services**

Mary Lee serves as the Assistant Director of the Planning & Wealth Support and Planning & Wealth Consulting teams, where she leads a team of Financial Planning Associates and Business Consultants. Her primary focus is fostering their growth and development into highly effective consultants for our field. With a rich background spanning 24 years at Northwestern Mutual, and 20 years on the Financial Planning Consulting team, Mary Lee has progressed through various roles, from Consultant to Manager. Prior to her tenure at Northwestern Mutual, she worked as a Financial Consultant at Smith Barney.

Mary Lee earned her Bachelor of Business Administration from St. Norbert College in DePere, Wisconsin. She is distinguished by her professional designations: CLU®, ChFC,® CASL®, RICP®, and CLTC®. Additionally, she holds FINRA licenses 6, 7, 63, 65, and 24 registrations, as well as Wisconsin Life, Accident, and Health Licenses.

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**Faith Clark, CLU® | Financial Planning Business Consultant**

Faith began her career with Northwestern Mutual in 2008, spending the early years of her NM career in the field. During that time, Faith worked with the FR internship program; in full-time training, development and coaching; in District Office administration and CRC program management; as the Network Office contracting, licensing & registration specialist; and was an advisor herself.

Faith joined the Home Office on the Planning and Wealth Consulting team in 2022, where she was able to continue to share her passion for financial education with the advisors and field teams she works with. She holds her FINRA Series 6, 63, and 7 securities registrations. Faith also maintains the CLU® designation and is currently pursuing the final course to complete the ChFC® designation

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**Erik Daniels | Financial Planning Business Lead**

Erik comes to Northwestern Mutual from a local financial advisory firm where he was the financial planner for two Wealth Management Advisors. Immediately prior, he was the director of a local Northwestern Mutual CFS team with a majority of advisors in the office subscribing to the service. In addition to working with advisors as a financial planner, investment educator and overseeing practice management, he also shared in the responsibilities of compliance oversight. Erik holds FINRA Series 7, 66, 9, and 10 registrations, as well as Life/Health and Property & Casualty licenses. Erik is a graduate of UW Whitewater with a major in Finance and a minor in Financial Planning.

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**Alexandra Eisenberger, FIC, BFA™, ChFC®, CFP®| Financial Planning Business Consultant**

Alex joined the Planning & Wealth Consulting team in 2025. Before coming to Northwestern Mutual, Alex was a Business Owner and Financial Advisor with Thrivent the last nine years.

Alex earned her Bachelor of Science degree from Michigan State University in Business Management with a focus on Supply Chain Management. She holds the designations, FIC, BFA™, **ChFC®,** CFP ®, FINRA Series 7, 65, and 63 registrations, and Life/Health licenses.

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**Sarah Mayet, CFP® | Financial Planning Business Consultant**

Sarah joined Northwestern Mutual and the Planning & Wealth Consulting team in 2024. Prior to her role as a Financial Planning Business Consultant, she was a Financial Planning Specialist at New York Life. Sarah has obtained a BS degree in entrepreneurship at University of Illinois and an MBA in Finance & Investment Management at University of Iowa. She holds her FINRA Series 7 & 66 securities registrations and CFP® designation.

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**David Mulder, ChSNC ® FSCP ®| Financial Planning Business Lead**

David came to Northwestern Mutual in 2016 with an established background in insurance, investments, and financial planning going back to 2004. His experience includes financial advisor, lead planner, educational speaker, business management and compliance. He also has experience with various planning and investment systems including eMoney, Naviplan (PPA) and PX. He holds the FINRA Series 6, 7, 63, 65 registrations and has earned the Financial Services Certified Professional (FSCP®) and Chartered Special Needs Consultant (ChSNC®) designations. David has a master's degree from Central Baptist Theological Seminary and a bachelor's degree from Northland International University.

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**Frederick J Pilipuf, CLU®, ChFC® | Financial Planning Business Lead**

Freddie joined the Planning & Wealth Consulting team in August 2022, bringing with him 22 years of financial services experience, including 19 years at NM. He has served in roles within several NM departments, including financial planning sales support, information technology, and enterprise compliance. As a significant contributor in the company's estate and business planning space, the business planning analysis software, and our underwriting process involving key employee and business valuation, he brings a wealth of knowledge to his current role. He has provided many years of consultation as a deep subject matter expert, best practice thought-leader, traveling field trainer, and phone support resource for personal planning (PPA/PX), estate and business planning (EBPS, BPA), and business retirement markets (401k, SEP, SIMPLE, cash balance plans, etc.). Prior to NM, he served as a securities principal, branch manager for Raymond James. He holds FINRA Series 7, 66, 9, and 10 registrations, as well as the CLU® and ChFC® designations.

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**Jack Schneider, CPA, CFP®, ChFC®, RICP®| Financial Planning Business Consultant**

Jack joined the Northwestern Mutual Planning & Wealth Consulting team in July of 2025, bringing with him 6 years of financial services experience, including 4 years in the field with NM. In his prior role, he helped a high-producing field team stand up a Fee-Based Planning Operation, achieve 5-star Pathfinder, and finish top 20 in the company for risk production.

With in-depth experience understanding and planning for the needs of high-income/ high net-worth households, Jack brings a wealth of knowledge to the advisors he serves across the field. Specifically, he enjoys planning areas such as Comprehensive Asset Allocation, Tax Strategy, Retirement Distribution planning, and Estate planning.

Jack holds the FINRA SIE, Series 63 and Series 7 registrations, the CFP®, ChFC®, RICP®, and CPA designations, and Life, Health, Accident, Variable Life and Variable Annuity licenses.

Jack is married to his high-school sweetheart, Katie, and currently resides just outside Milwaukee in Brookfield, WI. He loves spending time with family and friends, taking care of his health and fitness, and is always ready to swing the golf clubs or play some pickleball.

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**Brian Spaulding | Financial Planning Business Consultant**

Brian has been working in the finance industry for more than twelve years and joined the Planning & Wealth Consulting team in 2021. He has held multiple field-facing positions at Northwestern Mutual, including CRC Director, Assistant Director of Network Office Supervision, and Technology Productivity Consultant. Brian currently holds the FINRA Series 7, 66, 9, and 10 licenses.

Before coming to Northwestern Mutual, Brian was an Investment Consultant with Scottrade as well as a personal banker with Chase Bank. He has spent more than a decade educating clients how to achieve their financial goals and create stable financial futures. Brian holds a bachelor's degree in Economics and a Master's Degree in Business Administration.

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