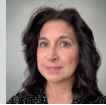
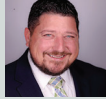


Advanced Planning Group

Through your New York Life agent, you have the opportunity to consult with a nationally known group of knowledgeable, experienced professionals trained to assess your goals and objectives, examine your current planning strategies, and offer well-researched suggestions and solutions to help you optimize your financial goals. Your agent can bring you and your advisors together with our consultants by phone, face to face, or in a virtual environment from anywhere in the country.

New York Life's Advanced Planning Group is a team of 25 individuals with experience as legal professionals, tax professionals, insurance providers, and financial services providers. They have advanced degrees, designations, and specialized training in law, estate taxation, accounting, business, insurance, finance, and philanthropic planning. Combined, they have more than 300 years of experience assisting with wealth strategies and business planning objectives in numerous concentrations.

Include your agent and New York Life's Advanced Planning Group in your planning process, and help preserve and protect what you've already spent a lifetime creating. Learn more at www.newyorklife.com/apg

Stephanie C. Bagwell JD		Chunxia (Violet) Cole JM, LL.M., MBA, ChSNC®		Nichole Crawford JD, LL.M., CLU®, ChFC®, RICF®		Dale Facey JD		Jesus O. Garcia Biales JD, LL.M.	
J.D. Harness JD		Eldridge T. Hawkins II JD, MBA		Allen Hensley MSFS, CLU®, ChFC®		Elizabeth Hill JD		Jeanmarie Holm JD	
Evan Horton JD, CLU®		Frank Huang JD, LL.M.		Madison R. Jones JD, MBA		Amine Khater JD		Jeff Klein CFP®	
Ting Liao JD, MBA		Antoinette Marshall JD, LL.M., CPA		Brad Penny LUTCF		Leilani K. Rivers JD		Luke I. Robinson JD, CLU®	
Wendell Stallings CFP®, ChFC®, CLU®, RICP®, WMCP®		Kirrupan Theivakumar JD		David R. Toups JD, MBA, CFA®, CFP®, CFTA®		Bradley J. Trevino JD, LL.M., MBA, MS		Angela M. Wethor JD, CPA	

New York Life, its agents, and its employees do not provide tax, legal, or accounting advice. Consult your own professional advisors before implementing any planning strategies. ©2021 New York Life Insurance Company. All rights reserved.

V1_AR08673.012025 SMRU 5059298 (exp. 3.31.2028)

