



Comprehensive Investment Solutions

The building blocks of your
comprehensive financial plan.



Eagle
Strategies
LLC



Value of trusted advice

Rather than merely recommending investments, a trusted financial advisor helps you build a comprehensive financial plan around your various goals, current financial situation, risk tolerance, and investment time horizon. Only then will their attention turn to crafting an optimized portfolio of investments—to help you achieve all of your short- and long-term goals.

Perhaps just as important, a financial advisor can help guide you in navigating volatile markets—working with you to deploy strategies that mitigate risk, so you can feel more comfortable adhering to your plan and staying invested.

Building your portfolio

Together, as we begin to formulate an investment solution to meet your particular goals, we'll focus on:

1. ASSET ALLOCATION.

The selection and weighting of asset classes (i.e., stocks, bonds, and cash) has the greatest impact on your investment performance and is essential to effectively managing portfolio risk. An optimal allocation is one that will give you a high probability of achieving your investment goals, while taking on as little risk as necessary so you can sleep at night.

2. DIVERSIFICATION.

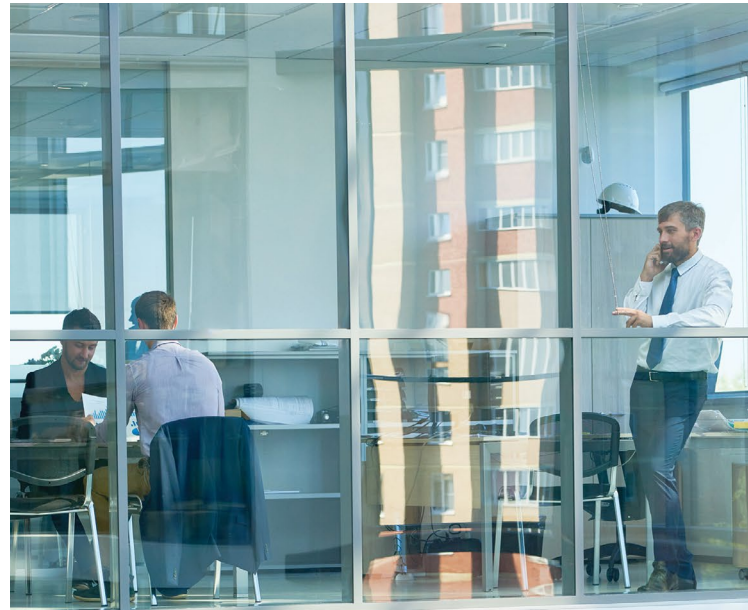
Asset allocation alone won't sufficiently reduce your investment risk. You also need to diversify your holdings within each of those asset classes. For example, by spreading your stock investments across large cap, small cap, growth, value, international, and emerging markets, you'll dramatically increase the likelihood of having some parts of your portfolio outperform even when others are underperforming.

3. REBALANCING.

Allocations can shift dramatically over time. What originally might have been a 60/40 stock to bond allocation could soon become a 75/25 allocation if stocks are growing at a significantly faster rate than bonds. Therefore, based on your time horizon and market movement, we may need to periodically re-balance your asset allocation to ensure your portfolio continues to meet your goals and risk tolerance.

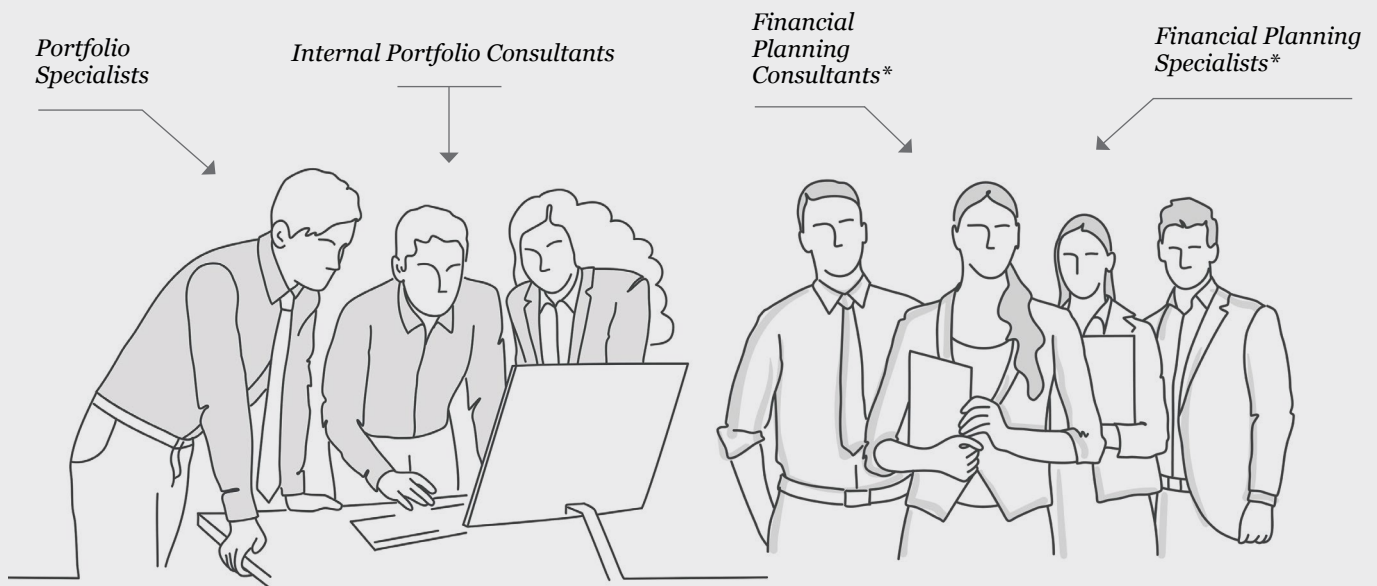
4. ADAPTING TO CHANGE.

Over time, you may find that your goals, financial circumstances, and/or risk tolerance have changed. When life changes occur, we'll sit down together and discuss how to best adapt your portfolio to meet these new requirements.



Specialized expertise & support

Our teams of highly experienced professionals with deep industry knowledge, and focused expertise, are here to support you and your Eagle Strategies financial advisor in modeling potential investment planning solutions, as well as constructing, managing, and rebalancing your portfolio.



INVESTMENT ADVISORY SALES & SOLUTIONS

PORTFOLIO SPECIALISTS

Partner with your advisor on portfolio construction, investment analysis, proposal navigation, and client reviews.

INTERNAL PORTFOLIO CONSULTANTS

Assist with investment research, selecting appropriate investment managers for your portfolio, and providing technology support.

FINANCIAL PLANNING STRATEGIES & SOLUTIONS

FINANCIAL PLANNING CONSULTANTS*

Thoroughly analyze your current financial health and design a customized solution that will help you meet specific financial goals.

FINANCIAL PLANNING SPECIALISTS*

Assess your financial plan and provide expertise in solution modeling, report generation, and plan presentation.



What investment advisory program is right for you?

Eagle Strategies' Lifetime Wealth Portfolios (LWP) platform offers you a choice of investment advisory programs to meet your unique needs and preferences:

PROGRAM	DESCRIPTION	INVESTOR TYPE
Fund Advisory	A broadly diversified portfolio of mutual funds and/or ETFs offered in a single investment account. Includes the services of a professional investment manager to formulate an asset allocation model designed to help meet your financial goals.	Designed for clients seeking access to professionally managed, diversified solutions at a lower minimum investment.
Separately Managed Accounts (SMA)	A targeted strategy of individual securities managed on your behalf by a professional asset manager. Typically, clients will combine several different SMA strategies to build a well-diversified portfolio.	Offers affluent clients greater control over their investments along with the benefits of customization, portfolio control, and tax management.
Representative Directed	Managed by your financial advisor, these portfolios typically encompass a mix of mutual funds and/or exchange-traded funds (ETFs).	Generally appropriate for clients who wish to actively participate in the portfolio construction and investment selection process with their advisor.
Unified Managed Account (UMA)	Combines several strategies from the above programs in a single account. An overlay manager coordinates your portfolio which may include stocks, bonds, SMAs, mutual funds, and ETFs.	Designed for affluent clients who wish to benefit from automatic rebalancing, tax overlay services, and streamlined portfolio reporting.

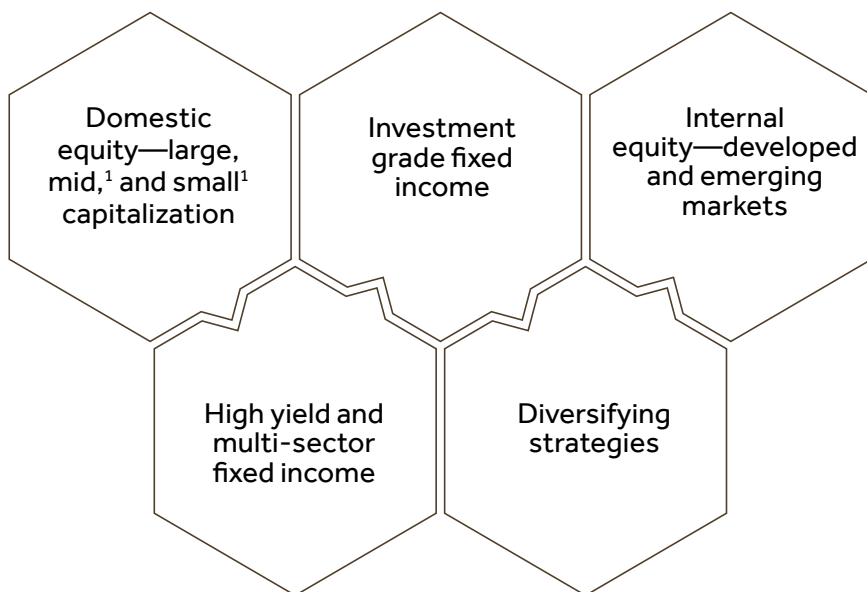




Leading investment managers

The caliber of the investments offered through our programs is the engine that drives your success.

Our platform incorporates a wide range of thoroughly vetted and monitored investment managers who bring specialized expertise to areas such as:



Every investment manager on the Eagle Strategies platform is subjected to a rigorous due diligence process. Our experienced analysts conduct research, on-site visits, and apply critical thinking to identify managers with a defensible, differentiated, repeatable, and sustainable edge. Once a manager is added, they're closely monitored to ensure they continue to meet our exacting standards. In the event that these standards are not met, the manager is removed and a suitable replacement is identified.



We are ready to work with you

We're committed to building enduring planning relationships that help you achieve your financial goals. Providing you with exclusive access to a comprehensive lineup of carefully selected and competitively priced investments is essential to the success of that mission.





**PROTECTION. RETIREMENT.
INVESTMENT. ESTATE.**

Trusted Guidance. Comprehensive Solutions.

Eagle Strategies LLC (Eagle) is an SEC-registered investment adviser. Registration with the SEC does not imply a certain level of skill or training. Eagle investment adviser representatives (IARs) act solely in their capacity as insurance agents of New York Life, its affiliates, or other unaffiliated insurance carriers when recommending insurance products and as registered representatives when recommending securities through NYLIFE Securities LLC (member FINRA/SIPC), an affiliated registered broker-dealer and licensed insurance agency. Eagle Strategies LLC and NYLIFE Securities LLC are New York Life Companies. Investment products are not guaranteed and may lose value. No tax or legal advice is provided by Eagle, its IARs or its affiliates.

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