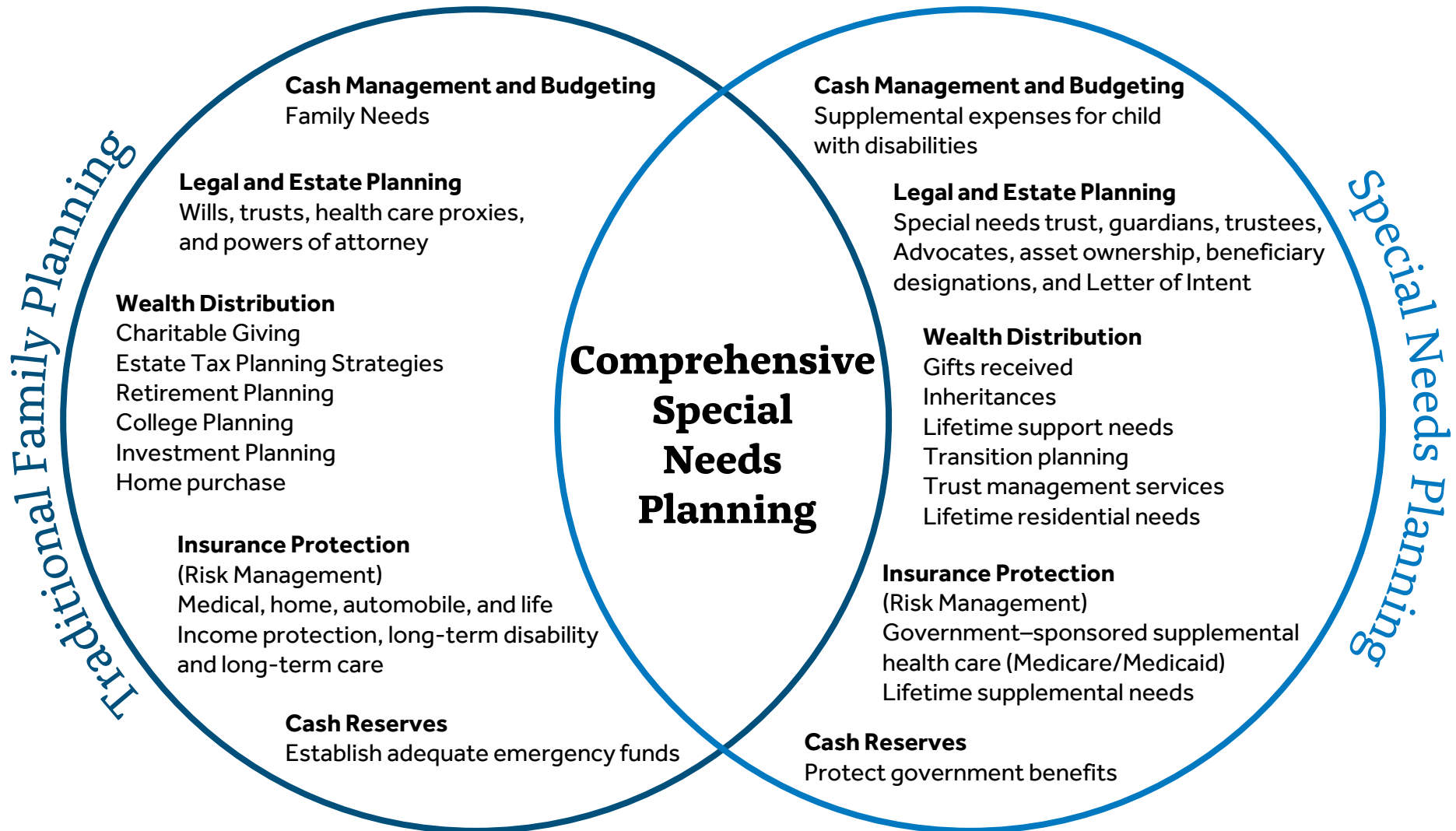


# Special Needs Planning Dynamics



# Special Needs Planning Dynamics Overview



Based on "The Special Needs Planning Guide: How to Prepare for Every Stage of Your Child's Life," by John W. Nadworny and Cynthia R. Haddad. ©2007 by Paul H. Brookes Publishing Co., Inc.

This material is provided for informational purposes only. New York Life Insurance Company, its agents or employees may not give legal, tax, or accounting advice and none is intended nor should be inferred from the foregoing information. We must necessarily insist that everyone seek and rely upon the guidance of their own professional counsel for such advice and that such advisors must form their own opinion on these matters based upon their independent knowledge and research. The Nautilus Group® is a service of New York Life Insurance Company. This material is prepared for Nautilus Member Agents and, as a courtesy, for select agents of New York Life Insurance Company. SMRU 8400603 Exp 9/30/2028

# Eagle Strategies LLC

---



Todd L. Middleton, CFP<sup>®</sup>, ChFC<sup>®</sup>, CHSNC, CLU<sup>®</sup>, RICP

10375 Centurion Parkway North, Suite 300

Jacksonville, FL 32256

☎ (904)997-3077

[tlmiddleton@ft.newyorklife.com](mailto:tlmiddleton@ft.newyorklife.com)

[www.toddmiddleton.com](http://www.toddmiddleton.com)

CA Insurance License Number 0K53549

Todd L. Middleton, Registered Representative offering securities through NYLIFE Securities LLC (Member FINRA/SIPC), a Licensed Insurance Agency, (10375 Centurion Parkway North, Suite 300, Jacksonville, FL, 32256, (904)997-3077). NYLIFE Securities LLC is a New York Life Company. Financial Adviser for Eagle Strategies LLC, a Registered Investment Adviser. Eagle Strategies LLC is a New York Life Company. Todd L. Middleton, CA Insurance License Number 0K53549.