



WISDOM INSIGHTS

Financial Solutions & Insurance Services, LLC



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Tracy Y. Chen 張毓笙畢業於紐約大學法學院，獲得法學碩士學位。畢業後成為一名律師，在曼哈頓數家知名律所工作超過15年，專注於房地產開發、資產累積、稅務減免規劃、財富繼承和家族信託規劃。

現在，Tracy Chen 致力於為本地社區個人和家庭服務。憑藉多年的財富和遺產規劃經驗，Tracy 深知，沒有一種單一方案能適用於每一個人及其家庭。她的成功在於她巧妙地把專業知識與各種投資和/或保險產品相結合，為客戶量身定製符合每一個家庭整體財務需求、目標的解決方案。

Tracy 的專注領域包含資產保障設計、跨國資產配置、人壽保險、退休規劃、傷殘（收入保障）保險和遺產規劃。除了致力於這些項目及培育新老客戶關係外，Tracy 還受邀參加美國各地的研討會，為其他財務專業人士提供教育和指導。

Tracy 在信託和財務策略方面創新且靈活的方法得到了Forbes 雜誌*的認可，該雜誌將她評為2021 年America's Top Financial Security Professionals 以及2022 年至2025年Best in State Financial Security Professionals之一。除此之外，Tracy還獲得了2017年至2025年Million Dollar Round Table** 的年度頂級會員資格。

Tracy Chen is a Financial Adviser offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser. Registered Representative offering securities through NYLIFE Securities LLC (member FINRA/SIPC), A Licensed Insurance Agency and a New York Life Company.

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**The Million Dollar Round Table (MDRT), The Premier Association of Financial Professionals, is recognized globally as the standard of excellence for life insurance sales performance in the insurance and financial services industry.

*Data provided by SHOOK®Research, LLC. Data as of 12/31/24. Source: Forbes.com (July, 2025).

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