Your Relationship with an Eagle Strategies Financial Advisor

Trusted advice and human guidance. The foundation of every Eagle Strategies client relationship.

Eagle Strategies LLC

A plan for today, tomorrow, and generations to come.

You have dreams—for yourself, your loved ones, and perhaps your business. Achieving and protecting those dreams, however, requires a great deal of thought and skillful planning.

Whether you're looking to secure a more comfortable retirement, save for your child's education, generate more income from your existing savings, or transfer assets to the next generation using a tax-efficient approach, an experienced Eagle Strategies financial advisor can guide you in planning for tomorrow's needs today while preserving your current cash flow.

Much like you would seek out the expertise of a specialist to address a specific medical concern, for example, a trusted financial advisor applies the same type of specialized knowledge and skills to caring for your financial health and longevity. From assessing your current condition and recommending strategies to improve your financial strength, to helping you avoid harmful behaviors, a financial advisor is there to provide counsel and represent your best interests.

The Eagle advantage

Eagle Strategies is a registered investment adviser (RIA) and wholly owned subsidiary of New York Life Insurance Company. Along with our parent company and affiliates, Eagle Strategies is dedicated to designing customized wealth management and insurance solutions to help you meet your unique financial goals. As an Eagle Strategies client, you'll have access to the solutions and expertise of:

EAGLE STRATEGIES

Our 90+ experienced financial specialists are dedicated to supporting you and your Eagle Strategies financial advisor through every aspect of the financial planning process.

NEW YORK LIFE

A Fortune 100 company with a history spanning over 175 years, New York Life is an industry leader in life insurance, investment annuity products, and long-term care insurance.

NYLIFE SECURITIES LLC

NYLIFE Securities is a full service broker/dealer capable of meeting the investment style of nearly every investor—from the novice to the sophisticated.

YOUR RELATIONSHIP WITH AN EAGLE STRATEGIES FINANCIAL ADVISOR

You can expect to receive well-thought-out guidance that will:

- Be conflict-free and in your best interest
- Put you on a clearer path toward your financial goals
- Help you pivot when life changes or unexpected circumstances arise
- Address your specific needs
- Assist you in building a wealth transition plan

Our comprehensive financial planning approach

Creating a financial plan doesn't have to be complex. It starts with you and your financial advisor, who is also a New York Life Agent and a NYLIFE Securities Registered Representative, having an in-depth conversation about all of your financial goals, as well as any monetary concerns that weigh on your mind. These discussions typically cover:

PROTECTION PLANNING.
Are you, your family, and/or your business properly protected from death, disability, or a long-term care event? Insurance can play a pivotal role in your overall plan—from income replacement to asset protection and the tax-efficient transfer of wealth.

RETIREMENT PLANNING.
What steps can you take to maximize your retirement savings? Are there other ways to augment your retirement income? Our retirement solutions include fixed, variable,[1] and income annuities, non-proprietary mutual funds,[1] and Eagle Strategies investment advisory services.

INVESTMENT PLANNING.
Your investment portfolio should directly reflect your goals, your time horizon, and risk tolerance. Ultimately, it is about achieving a high probability of success with as little risk as necessary. Our investment products include non-proprietary mutual funds[1] and Eagle Strategies investment advisory services.

ESTATE PLANNING.
Together, we can explore ways to transfer assets more efficiently to your beneficiaries, provide for family members with special needs, or facilitate the smooth transition of your business, as well as ensure you have the right estate planning documents and up-to-date beneficiary designations.

[1] Offered through NYLIFE Securities LLC (member FINRA/SIPC), a Licensed Insurance Agency.

You choose the best way you want to collaborate

Based on your needs and personal preference, you can engage us to provide a comprehensive plan that addresses your overall financial situation, or you can elect to focus on achieving a specific goal.

FROM THE FIRST MEETING…

This is a vital first step on the road to achieving your financial goals. You'll have an opportunity to ask questions, share your dreams and concerns, and provide important insight into your current financial situation as well as the people and causes that are important to you.

Through a comprehensive discovery process, we'll explore topics such as:

- Protecting your family and/or business in the event of your death or disability
- What an ideal retirement means to you
- Your thoughts on designing portfolios focused on achieving specific goals rather than simply seeking to maximize return
- Leaving a meaningful legacy for the people and/or charities you wish to support

With a thorough understanding of your entire financial picture, the goals you have established for your future, and a collaborative series of meetings, together we will build a strong but flexible plan to help you get there.

…TO THE MONTHS AND YEARS AHEAD

Establishing a plan to help you accomplish all your financial goals is the first step in a long, valued relationship built on frequent communication, trust, and a conflict-free commitment to serve your best interests.

As your life evolves, your financial goals and priorities will inevitably shift or change. Rest assured that your Eagle Strategies financial advisor will be there to provide thoughtful guidance on how best to meet these new objectives.

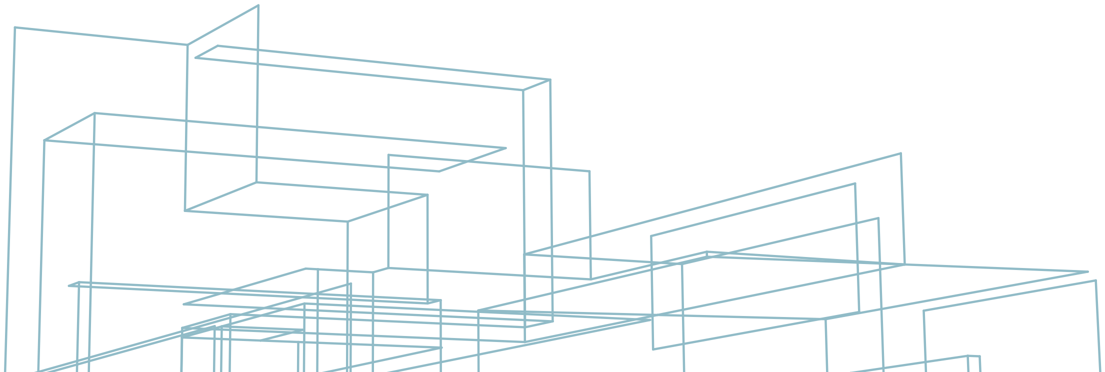
And when the time comes to transition your wealth to the next generation, you can do so knowing that we not only understand your wishes, but will be here to help the next generation benefit from your life's work.

Stay connected

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

As an Eagle Strategies client, you'll have access to a wide range of resources to keep you connected and to support you throughout your financial journey, including:

- A dynamic online client portal, providing access to your account statements, real-time market value of securities, performance reporting, trade confirmations, and tax documents
- Electronic delivery of account documents
- A dedicated support line of experienced professionals to support you and your financial advisor, and assist with any questions related to your account



Let us get to work for you

In 1929, a New York Life executive wrote that we must remember “to look at time not in years merely, but in decades; even generations.” That philosophy continues to embody our approach to every client relationship. Together, we’ll help guide you in making more informed decisions about how to secure and achieve your dreams. And, we’ll be here to help you navigate unexpected or evolving circumstances. Ours is, first and foremost, a long-term partnership built on trust, and we look forward to working with you.

PROTECTION. RETIREMENT.
INVESTMENT. ESTATE.

Trusted Guidance. Comprehensive Solutions.

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Eagle Strategies LLC

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