



## JW INSURANCE & FINANCIAL SERVICES

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王晶拥有 20 多年从业经验，专注为高净值个人与家庭、企业主及家族企业提供战略性、税务高效的方案，协助他们在资产保护、财富增长及传承方面实现长期目标<sup>1</sup>。作为特许人寿保险核保师（CLU®）及连续 19 年业界的百万圆桌（MDRT）会员<sup>2</sup>，王晶以其深厚的专业能力、诚信品格及以客户为本的服务理念著称。



### JWIFS的宗旨

我们的使命：为客户提供清晰的方向、精准的策略以及他们所需的保障，让他们今天、明天、以至几代人都能做出稳健合宜的财务决策。无论人生与市场如何变迁，他们都能自信和安心地应对未来。

### 专业领域

- 资产保护与风险管理
- 税务优化与最小化策略
- 退休与长期护理规划
- 遗产规划与传承

持有马萨诸塞州及其他 12 个州（CA\*、CT、FL、MI、NC、NH、NJ、NY、OK、PA、RI、TX）的执业资质。

### 方式和理念

王晶的服务全面且具整合性，能够将财务策略与客户的价值观、目标及传承愿景相融合。在制定方案前，她会深入了解每位客户的需求、优先事项、挑战与期望。无论是保护已建立的财富、创造可持续的收入、优化税负，还是确保家人得到妥善照顾，她都将以专业与诚信为客户提供个性化、一站式的资产规划，指导他们从财产保值、增值到最终的传承一路稳步前行。

\*CA Insurance License Number OE55652

\*New York Life awards for outstanding sales performance. Council is an annual recognition program based on agent production from July 1- June 30.

1 Investment products are offered through NYLIFE securities LLC (Member of FINRA & SIPC), a Licensed Insurance Agency.

2 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.

3 Neither New York Life Insurance Company nor JW Insurance and Financial Services or any of their representatives provides tax, legal, or accounting advice. Please consult your own tax, legal, or accounting professional before making any decisions.

Jing Wang is an agent of New York Life Insurance Company. Jing Wang is a Registered Representative of and offers securities products & services through NYLIFE Securities LLC, Member FINRA/SIPC, A Licensed Insurance Agency.

Jing Wang is also a Financial Adviser offering investment advisory services through Eagle Strategies LLC, A Registered Investment Adviser.

NYLIFE Securities and Eagle Strategies are New York Life companies. JW Insurance and Financial Services is not owned or operated by NYLIFE Securities LLC or any of its affiliates.

所有保单、合约等相关文件仅以英文版本提供。如有争议，一律以保单和合约中的条款为准。The offering documents (policies, contracts, etc.) of all products are available only in English. In the event of a dispute, the provisions in the policies and contracts will prevail.



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With over 20 years of experience, Jing Wang specializes in providing strategic, tax-efficient solutions for high-net-worth individuals and families, business owners, and family enterprises, helping them achieve long-term goals in asset protection, wealth growth, and legacy transfer<sup>1</sup>.

As a Chartered Life Underwriter® (CLU®) and 19-year consecutive member of the Million Dollar Round Table (MDRT)<sup>2</sup>, Jing is recognized for her deep expertise, integrity, and client-first philosophy.



### JWIFS MISSION STATEMENT

*Our mission is to provide our clients with clear direction, precise strategies, and the assurance they need to make sound, well-aligned financial decisions – today, tomorrow, and for generations to come. No matter how life and markets change, they can always face the future with confidence and peace of mind.*

### AREAS OF EXPERTISE

- **ASSET PROTECTION & RISK MANAGEMENT**
- **TAX OPTIMIZATION & MINIMIZATION STRATEGIES<sup>3</sup>**
- **RETIREMENT & LONG-TERM CARE PLANNING**
- **ESTATE PLANNING & LEGACY TRANSFER**

Licensed in Massachusetts and 12 other states (CA\*, CT, FL, MI, NC, NH, NJ, NY, OK, PA, RI, TX).

### APPROACH & PHILOSOPHY

Jing's services are comprehensive and integrative, aligning financial strategies with each client's values, objectives, and vision for legacy. Before developing any plan, she takes the time to understand each client's needs, priorities, challenges, and expectations. Whether it is protecting established wealth, generating sustainable income, optimizing tax burdens, or ensuring family members are well cared for, Jing delivers personalized, one-stop asset planning with professionalism and integrity, guiding clients steadily from preservation, to growth, and ultimately to legacy.

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