



王晶 特许寿险核保师

Jing Wang, CLU®

NYLIFE Securities 注册代表

鹰锐策略 (Eagle Strategies) 公司财务顾问

资产保护/退休及遗产规划/收入保障/人寿保险/商业规划/投资¹

王晶女士拥有美国特许寿险核保师 (CLU®) 资格，麻州波士顿东北大学工程理学硕士学位。从业近二十年来，王晶女士积累了丰富的资产保障及财务策略经验。王晶女士也是全球人寿保险精英的荣誉组织“百万圆桌”的2007-2022年会员²。她致力于帮助客户建立个性化、安全及有效的家庭财产保护策略以保障其财务未来。

作为一名特许寿险核保师和理财专业人士，王晶女士在对如何最大限度的保障家庭资产，降低所得税³，为孩子提供教育基金，做好退休和长期护理规划，减少资本风险，建立收入保障以及降低遗产成本方面有很多年的经验。她的客户来自社会的各个层面，不同行业的企业家，专业人士，将要退休及已退休人士。她会对客户整体的财务状况进行了解和分析，与客户共同讨论他们的财务目标和需要承担的责任。王女士运用她丰富的财务知识经验和广泛的保险和理财工具，为有资产人士出谋划策，设计出符合个人及家庭情况的规划策略，最大限度的帮助他们保存和创造家庭财富。

王晶在美国麻州及其他七个 (NH, CT, DC, RI, TX, NY, FL) 可为客户提供免费保险咨询服务，投保流程跟进，定期跟踪回顾保单，一对一定制化服务。王晶女士为客户设计出稳妥合适的方案，以降低风险、保值增值资产、顺利退休及传承家庭财富，并帮助他们执行这些方案。

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会员

2007-2022年百万圆桌协会会员²

波士顿遗产规划协会 BEPC

女性保险金融服务协会 WIFS

荣誉*

2016-2022

2017

2015

2014

2012-2015

2008-2011

2007

2006

2004-2006

纽约人寿主席委员会特优成就奖

纽约人寿波士顿分公司年度最佳业务代表奖

纽约人寿波士顿分公司全明星奖

纽约人寿波士顿分公司超级明星奖

纽约人寿总裁成就奖

纽约人寿优秀业绩奖

纽约人寿总裁成就奖

纽约人寿波士顿分公司年度新秀奖

纽约人寿优秀业绩奖

*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.

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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. SMRU 1952871 Exp 8.9.2023



Jing Wang, CLU®

**Chartered Life Underwriter (CLU®)
Registered Representative
NYLIFE Securities LLC
Eagle Strategies LLC Financial Adviser**

**Asset Protection· Retirement & Estate Planning
Income Protection· Life Insurance· Business
Planning· Investments¹**

Jing Wang has the CLU® designation (Chartered Life Underwriter®), she holds a Master of Science degree in Engineering from Northeastern University. With almost 20 years in the business, Ms. Jing Wang has accumulated extensive experience in asset protection and financial strategies. Ms. Jing Wang is also a member of The Million Dollar Round Table² from 2007 to 2022. She is dedicated to helping her clients build personalized, secure and effective family asset protection strategies to protect their financial future.

As a Chartered Life Underwriter® and financial professional, Ms. Wang has years of experience in how to help maximally protect a family's assets, reduce taxes³, provide educational funding for children, streamline retirement and long-term care planning, reduce capital risk, establish income protection, and reduce estate cost. Her clients are from all walks of life: entrepreneurs from different industries, professionals, pre-retirees and those who have already retired. She will try to understand and analyze her client's overall financial situation, discuss with them about their financial goals and the responsibilities that they need to assume. By leveraging her rich financial experience and knowledge and the extensive insurance and financial management tools, Ms Wang helps individuals with means to establish planning strategies that fit their individual and family situations, so as to maximally help them preserve and create family wealth.

Jing can provide clients with free consultations for insurance related matters, insurance application process follow-up, regular policy review, one-on-one services in Massachusetts and seven other states (NH,CT,DC,RI,TX,NY,FL). Jing designs prudent and appropriate solutions for clients in risk reduction, asset preservation and growth, retirement and family wealth succession, and helps them implement these solutions.

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Membership

- 2007-2022 Member of The Million Dollar Round Table² (MDRT)
- Member of Boston Estate Planning Council
- Member of WIFS (Women in Insurance & Finance Services)

Professional Achievement*

- 2016-2022 New York Life Chairman's Council Award
- 2017 New York Life Boston General Office Agent of The Year Award
- 2015 New York Life All Star – Boston General Office
- 2014 New York Life Super Star – Boston General Office
- 2012-2015 New York Life President's Council Award
- 2008-2011 New York Life Executive Council Award
- 2007 New York Life President's Council Award
- 2006 New York Life Rookie of the Year – Boston General Office
- 2004-2006 New York Life Executive Council Award

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