



THE NAUTILUS GROUP®



# You have dreams. Aspirations. Goals.

You may want to travel the world or settle in your own cozy little corner. Or maybe your destination is still unknown. Wherever you are on your journey, we can help you chart your course and navigate your financial future.



# You have sophisticated financial needs.

---

Access to accurate, well-researched information in the complex financial arena is essential for developing clarity and confidence as you secure your family's financial future.

Tax Planning Strategies

Estate & Legacy Planning

Business Succession  
& Exit Planning

Retirement Income Planning

Special Needs Planning

Insurance Planning

# We provide custom solutions based on a holistic approach.

---

We offer a wide range of consultative services and technical case design.

▼  
Tax  
Planning  
Strategies

▼  
Estate,  
Gift & Trust  
Planning

▼  
Business  
Succession &  
Exit Planning

▼  
Charitable  
Planning

▼  
Retirement  
Income  
Planning

▼  
Executive  
Benefits

▼  
Special  
Needs  
Planning

▼  
Life  
Insurance  
Planning

▼  
Asset  
Preservation  
& Protection

▼  
Employee  
Benefits







# Our Mission

---

We're here to get to know you, to understand your dreams and aspirations, and to offer you state-of-the-art strategies designed to help turn your goals into reality.

# Our Approach

---

One of the most important differences in the value we provide to our clients is our commitment to a team approach.

We work hand in hand with you, your attorneys, accountants, trust officers, and other advisors.

This team approach provides a holistic picture of your unique financial needs.



# Our Process

---

It starts with understanding what's important to you.

1

Gain a clear understanding of your concerns and objectives.

2

Collaborate with your other professional advisors.

3

Utilize the industry leading resources of The Nautilus Group.

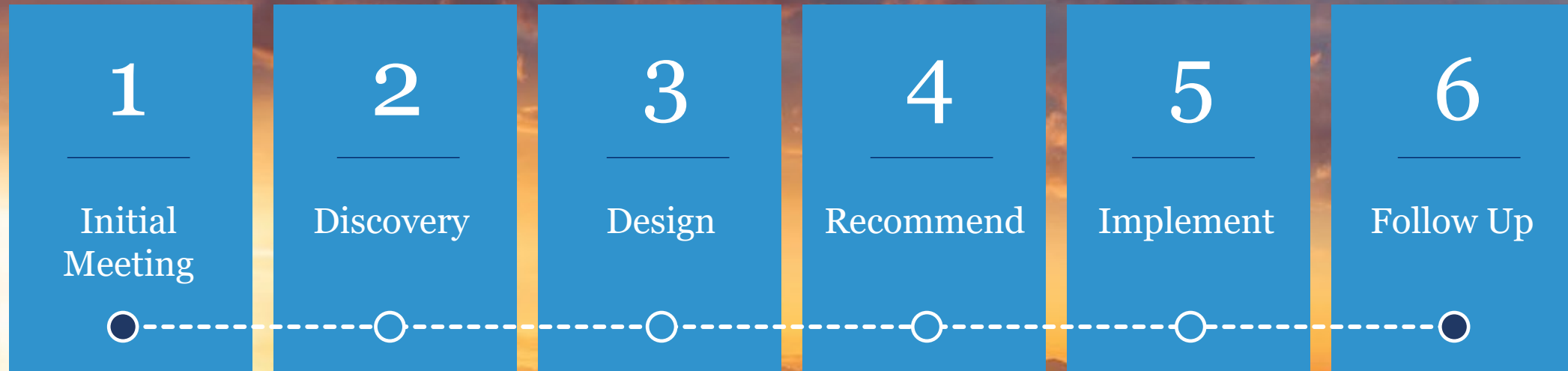
4

Analyze and project your personal and business financial situations.

# Our Process

---

Through this proven process, we identify goals and analyze potential gaps. We explore possible strategies to achieve your goals and close any gaps. We then work with you for the long term, helping you implement and follow up on your chosen course of action.





# Our Clients

---

The types of clients we can best help are those who prioritize:



Financial  
Security

---



Family  
Protection

---



Business  
Continuity

---



Leaving a Legacy for  
Future Generations

---



# Our Clients

---



CPAs



Business Managers



Business Owners



Corporate Executives



Retired Executives



High Net Worth  
Individuals &  
Families



Professional  
Athletes &  
Entertainers



Physicians &  
Professionals



Attorneys



Farmers & Ranchers

# Our Resources

---

We are proud to partner with New York Life Insurance Company, which has received the highest financial strength ratings currently awarded to a U.S. life insurer.\*

For more than 180 years, New York Life has preserved its heritage while evolving and innovating to meet the needs of its clients. New York Life has stayed the course through the economic ups and downs that have defined our nation.



*\*Individual independent rating agency commentary as of 10/4/2024 : A.M. Best (A++), Fitch (AAA), Moody's Investors Service (Aaa), Standard & Poor's (AA+).*





# Our Resources

---

## The Nautilus Group®

Nautilus Members are carefully chosen from the top tier of financial professionals across the country and given access to a dedicated team of highly qualified planning professionals and resources exclusively designed for their high net worth and affluent clients.



THE  
NAUTILUS  
GROUP®

*The Nautilus Group is a service of New York Life Insurance Company;  
membership is limited exclusively to the company's agents.*



# Our Resources

---



THE  
NAUTILUS  
GROUP®

Nautilus is staffed by some of the top legal, tax, business succession, philanthropic, executive benefits, and retirement planning experts in the country.







# Our Resources

---

## Registered Representative of NYLIFE Securities LLC

NYLIFE Securities has the resources needed to provide you with world-class brokerage services and a wide variety of investment options, helping you maximize your opportunities to grow and maintain your wealth.



NYLIFE  
SECURITIES

*NYLIFE Securities LLC is a wholly owned subsidiary of New York Life Insurance Company, (Member FINRA/SIPC) A Licensed Insurance Agency.*

# Why choose a Nautilus Member Agent?

---

1

Resources

2

Education

3

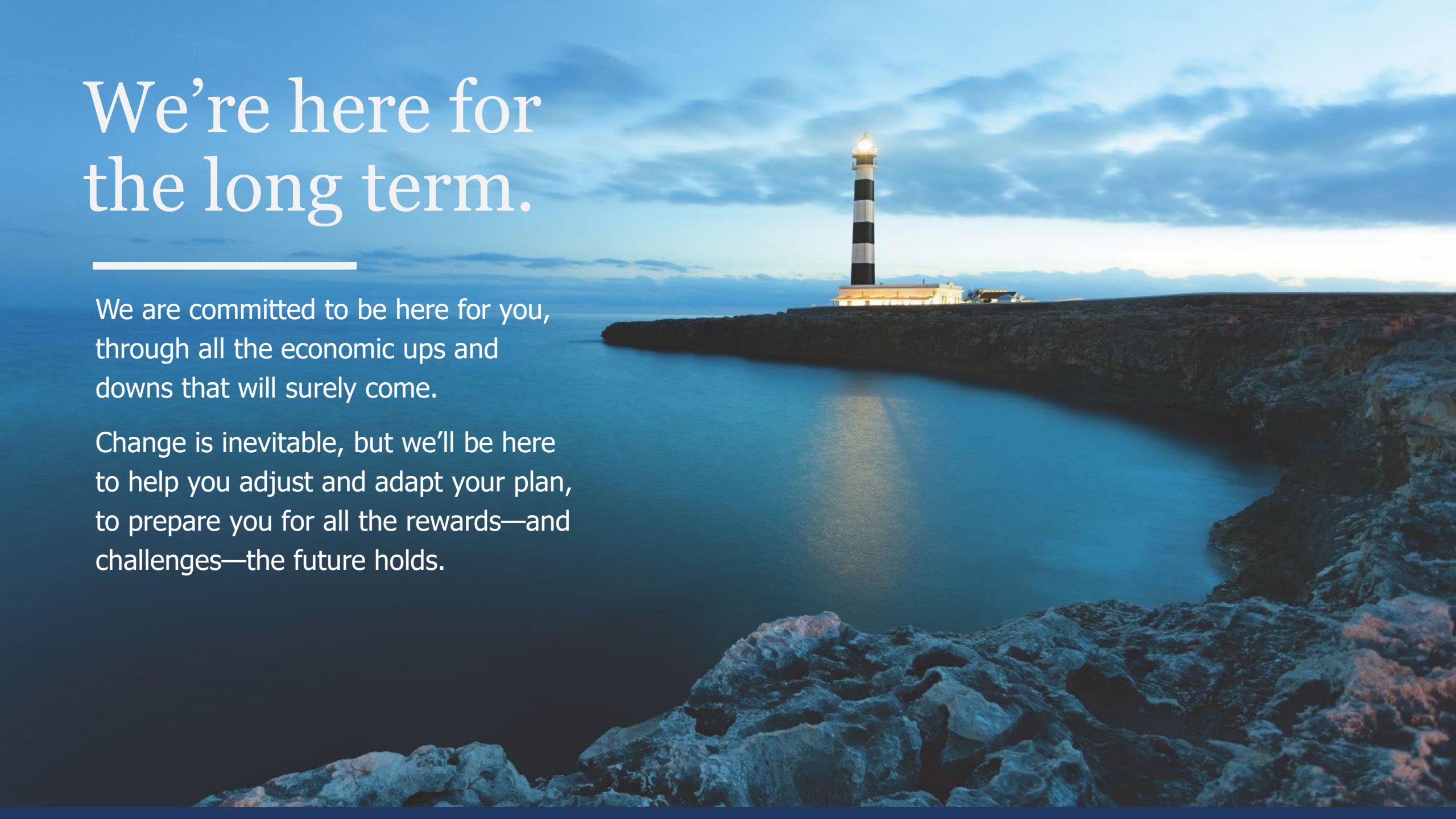
Professionalism

# We're here for the long term.

---

We are committed to be here for you, through all the economic ups and downs that will surely come.

Change is inevitable, but we'll be here to help you adjust and adapt your plan, to prepare you for all the rewards—and challenges—the future holds.







We want to be your  
trusted financial  
professional.

---

To learn more, visit  
<https://www.plannow.net/>





## Mitch Rosenberg, CFP®, CLU®, ChFC®, MSFS, AEP®

### MDR Insurance and Financial Services

Mitch specializes in investment management and holistic planning for life, disability and long-term care insurance, business succession, charitable, estate, executive benefits, and financial and tax strategies. He serves a diverse clientele including business owners, professionals, corporate executives, real estate owners, high net worth individuals, families, physicians, professional athletes, and entertainers. Mitch is a well-respected resource and trusted advisor to other professionals. He has been named to the 2024 Forbes America's Top Financial Security Professionals list. Rosenberg is ranked #27 nationally and #2 in California. Mitch graduated Phi Beta Kappa from the University of California, Berkeley, Haas School of Business.

889 Pierce Court, Suite 102  
Thousand Oaks, CA 91360  
805-494-4525

[mdrosenberg@eaglestrategies.com](mailto:mdrosenberg@eaglestrategies.com)

[www.PLANNOW.net](http://www.PLANNOW.net)

CA Insurance license #0698571

Mitch Rosenberg, CFP®, CLU®, ChFC®, MSFS, AEP®, Member, The Nautilus Group®, a service of New York Life Insurance Company. Membership is limited exclusively to the company's agents. Registered Representative offering securities through NYLIFE Securities LLC (member FINRA/SIPC), A Licensed Insurance Agency, 889 Pierce Court, Suite 102, Thousand Oaks, CA 91360, 805-494-4525. Financial Adviser offering investment advisory services through Eagle Strategies LLC, A Registered Investment Adviser. New York Life Insurance Company, its affiliates, and agents and employees thereof do not provide legal, tax or accounting advice. Clients are urged to seek the advice of their own professionals before implementing any planning strategies. MDR Insurance & Financial Services is not owned or operated by New York Life or its affiliates. Neither SHOOK nor Forbes receives any compensation in exchange for placement on its Top Financial Security Professional (FSP) rankings, which are determined independently (see methodology). FSP refers to professionals who are properly licensed to sell life insurance and annuities. FSPs may also hold other credentials and licenses which would allow them to offer investments and securities products through those licenses. Ranking algorithm is based on qualitative measures learned through telephone, virtual and in-person interviews to measure best practices. Also considered: client retention, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as: assets under management, sales figures and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and audited performance reports are rare. Individuals must carefully choose the right FSP for their own situation and perform their own due diligence. SHOOK's research and rankings provide opinions intended to help individuals choose the right FSP and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. For more information, please see [www.SHOOKresearch.com](http://www.SHOOKresearch.com). SHOOK is a registered trademark of SHOOK Research, LLC SMRU 5015706 Exp. 7/31/2027