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## **Mitch Rosenberg named to Forbes' Top Financial Security Professionals List of 2025**

**THOUSAND OAKS, Calif.** – Mitch Rosenberg, CFP®, CLU®, MSFS, AEP®, from the San Fernando Valley Office of New York Life has been named to the 2025 Forbes Top Financial Security Professionals list. The 100 individuals in this group of distinguished professionals were chosen based on many criteria considered by SHOOK®Research, an independent research firm.

Rosenberg is ranked #3 in Southern California and #66 nationally. SHOOK Research's ranking are based on one simple notion: "Would we recommend these professionals to a family member or a friend?"

A financial professional and New York Life agent for almost four decades, Rosenberg received this recognition for helping his clients in a world in which wealth preservation and protection matter more than ever. Rosenberg operates under the business MDR Insurance & Financial Services, which he founded.

"We are honored that Mitch appears on this prestigious list," said Kevin Boland, Managing Partner of the New York Life San Fernando Valley General Office. "New York Life has known for quite some time what a valuable asset Mitch has been to our family and to many families and businesses in our community."

Rosenberg is a Certified Financial Planner®, Chartered Life Underwriter® and an AEP®. He earned his bachelor's degree in finance and accounting from the University of California at Berkeley's Hass School of Business, and a Master of Science in Financial Services degree from the American College, Bryn Mawr, PA. Rosenberg is a former president and active member of both the Conejo Valley Estate Planning Council and the Woodland Hills Estate and Tax Planning Council.

Being ranked among the best insurance and financial security professionals in the state and country is "humbling," said Rosenberg. "It is very rewarding and validating to be recognized for the hard work we do focusing on our clients' financial well-being and security," he said. "I did not do it alone. I have been very fortunate to work with great people, terrific clients, fantastic advisors and my many resources at New York Life. They

have given me inspiration, resources, and tools to help me be the best Trusted Advisor I can be to help my clients achieve their goals.”

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*For more information about Mitch Rosenberg and MDR Insurance & Financial Services, visit [www.plannow.net](http://www.plannow.net). Rosenberg can be reached at 805-494-4525 or by email at [mdrosenberg@eaglestrategies.com](mailto:mdrosenberg@eaglestrategies.com).*

*For easy reference, here is the link to Rosenberg’s rankings profile on Forbes.com: <https://www.forbes.com/profile/mitch-rosenberg/>*

*Mitch Rosenberg is a Financial Adviser offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser. MDR Insurance & Financial Services is independently owned and operated from Eagle Strategies LLC and its affiliates.*

*Read more about the list and the ranking methodology here. <https://www.forbes.com/sites/rjshook/2025/07/10/methodology-americas-top-financial-security-professionals-2025/>*

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