

## Bernard E. "Bernie" Rosen, CLU<sup>®</sup>, ChFC<sup>®</sup>



### Managing Director

Bernie is Managing Director with New York Life Executive Benefits LLC (NYLEX Benefits). NYLEX Benefits is a subsidiary and the executive benefits consulting arm of New York Life Insurance Company, a Fortune 100 company, the largest mutual life insurance company in the United States<sup>1</sup>. With an enviable 166-year history, New York Life, combined with its affiliates, had \$316.1 billion in assets under management<sup>2</sup> and \$16.8 billion in consolidated surplus and asset valuation reserves<sup>3</sup> at December 2010. New York Life Insurance Company and its subsidiary New York Life Insurance and Annuity Corporation have received the highest ratings

currently awarded to any life insurer by all four ratings agencies: A.M. Best (A + +), Moody's (Aaa), Standard and Poor's (AA +) and Fitch (AAA) for financial strength.<sup>4</sup>

Prior to joining NYLEX Benefits, Bernie worked for Benefits Group WorldWide after a successful 20-year career in securities and insurance marketing. At Benefits Group WorldWide, Bernie managed the firm's strategic business relationships and international business development. Since entering the life insurance business in 1975, he has devoted his efforts to the fields of executive benefits, estate planning and retirement planning.

Bernie graduated in 1970 from the American University in Washington, D.C. School of Government and Public Administration with a Bachelor of Arts degree. He has earned both his Chartered Life Underwriter and Chartered Financial Consultant designations from the American College. He is a past president of the Los Angeles Chapter of CLU<sup>®</sup> and ChFC<sup>®</sup>, as well as past president of the Life Underwriters Association of Los Angeles. Bernie also served on the Board of Trustees of the California Association of Life Underwriters.

Bernie was formerly a member of the Executive Board of the Cystic Fibrosis Foundation of Southern California and Utah.

Bernie, his wife Felicia and his daughter Jenna reside in Malibu, California.

Tel: (310) 454-6807

Cell: (310) 422-0801

Fax: (310) 459-7365

[bernierosen@nylexbenefits.com](mailto:bernierosen@nylexbenefits.com)

<sup>1</sup>New York Life is the largest mutual life insurer based on the Fortune 500 ranking within industries for Insurance: Life, Health (mutual), Fortune Magazine, May 23 2011. <sup>2</sup>Assets Under Management consists of the Company's domestic and international insurance operations and assets the company manages for third-part investors, including mutual funds and pension plans. <sup>3</sup>Consolidated statutory surplus and asset valuation reserve (AVR is a special reserve that stabilizes surplus from fluctuations in the market value of bonds, stocks, mortgage loans, real estate, and other invested assets) are the funds that ensure we can meet our future obligations to policyholders and finance our growth. <sup>4</sup>Source: Individual Third Party Ratings Reports (as of 8/8/2011). 447179 (exp. 9/13)