



Advanced Planning Group

Through your New York Life agent, you have the opportunity to consult with a nationally known group of knowledgeable, experienced professionals trained to assess your goals and objectives, examine your current planning strategies, and offer well-researched suggestions and solutions to help you optimize your financial goals. Your agent can bring you and your advisors together with our consultants by phone, face to face, or in a virtual environment from anywhere in the country.

New York Life's Advanced Planning Group is a team of over 30 individuals experienced as legal and tax professionals, and insurance and financial service providers, with advanced degrees and designations and specialized training in law, estate taxation, accounting, business, insurance, finance, and philanthropic planning. Combined, we have more than 300 years of experience assisting with wealth strategies and business planning objectives in numerous concentrations.

Include your agent and New York Life's Advanced Planning Group in your planning process and help preserve and protect what you've already spent a lifetime creating.

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Learn more at www.newyorklife.com/apg

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