

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 with experience as legal professionals, tax professionals, insurance providers, and financial services providers. They have advanced degrees, designations, and specialized training in law, estate taxation, accounting, business, insurance, finance, and philanthropic planning. Combined, they 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. Learn more at www.newyorklife.com/apg

Stephanie C. Bagwell JD	Jaehong "Jake" Choi JD	Christi Cottrell JD	Dale Facey JD	Filka Forkin JD
Jesus O. Garcia Briaes JD, LL.M	J.D. Harness JD	Elizabeth Hill JD	Jeanmarie Holm JD	John Irvin CPA, CLU®, ChFC®
Amine Khater JD	Jeff Klein CFP®	Brian Lamborne JD, LL.M	Tony Li	Joel S. Liu JD
Antoinette Marshall JD, LL.M., CPA	Richard C. Martin JD, LL.M, MBA, CLU®, ChFC®, CFP®	Brad Penny LUTCF	Geoff Pfeiffer JD, CLU®, ChFC®, AEP	Glenn Plotkin JD, CLU®, ChFC®, CFP®, CTFA®
Rick Popper JD	Amanda Sarp JD	Ross Sims III JD	Aridaman "Ari" Shah Singh JD, MA	Kirrupan Theivakumar JD
Bradley J. Trevino JD, LL.M, MBA, MS	Sarah M. Trevino JD, LL.M., MBA	Beady B. Waddell III JD, LL.M, MBA, CLU®, ChFC®	Angela M. Wethor JD, CPA	Adam Zack JD
Gina M. Zippilli JD				

New York Life, its agents, and its employees do not provide tax, legal, or accounting advice. Consult your own professional advisors before implementing any planning strategies. ©2021 New York Life Insurance Company. All rights reserved.

V2_AR08673.022022 SMRU 1615321 (exp. 3.31.2023)

