



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

<p>Caroline K. Akers JD, LL.M</p> 	<p>Stephanie C. Bagwell JD</p> 	<p>Alan Chew JD, CPA, CLU®, ChFC®</p> 	<p>Jaehong "Jake" Choi JD</p> 	<p>Christi Cottrell JD</p> 
<p>Rob Erickson JD</p> 	<p>Dale Facey JD</p> 	<p>Filka Forkin JD</p> 	<p>Jesus O. Garcia Briales JD, LL.M</p> 	<p>J.D. Harness JD</p> 
<p>Jeanmarie Holm JD</p> 	<p>John Irvin CPA, CLU®, ChFC®</p> 	<p>Mark Jansen JD, CPA, CLU®, ChFC®</p> 	<p>Jeff Klein CFP®</p> 	<p>Brian Lamborne JD, LL.M</p> 
<p>Tony Li</p> 	<p>Joel S. Liu JD</p> 	<p>Richard C. Martin JD, LL.M, MBA, CLU®, ChFC®, CFP®</p> 	<p>Lillie Nkenchor JD</p> 	<p>Pratik Patel JD</p> 
<p>Brad Penny LUTCF</p> 	<p>Geoff Pfeiffer JD, CLU®, ChFC®, AEP</p> 	<p>Rick Popper JD</p> 	<p>Amanda Sarp JD</p> 	<p>Ross Sims III JD</p> 
<p>Aridaman "Ari" Shah Singh JD, MA</p> 	<p>Kirrupan Theivakumar JD</p> 	<p>Bradley J. Trevino JD, LL.M, MBA, MS</p> 	<p>Sarah Trevino JD, MBA</p> 	<p>Beady B. Waddell III JD, LL.M, MBA, CLU®, ChFC®</p> 
<p>Angela M. Wethor JD, CPA</p> 	<p>David Wilcox CLU®, ChFC®, LUTCF</p> 	<p>Melissa Winn JD, LL.M</p> 	<p>Adam Zack JD</p> 	<p>Gina M. Zippilli JD</p> 

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. ©2020 New York Life Insurance Company. All rights reserved. SMRU1615321 (03/31/2021).

