

Building better futures together for 175 years.



New York Life thriving in any environment

- ▶ America's oldest and largest mutual life insurer¹
- ▶ New York Life has received the highest financial strength ratings currently awarded to any U.S. life insurer by Standard & Poor's (AA+); A.M. Best (A++); Moody's (Aaa); and Fitch (AAA)²
- ▶ #73 on the prestigious Fortune 500 list for 2020¹
- ▶ Continued leadership of the Million Dollar Round Table (MDRT)³ with 2,581 members in 2020⁴

Drive your own career with multiple career paths

Financial Specialist

- Insurance licensed
- Help clients achieve their long-term financial goals with our product suite, which includes life insurance, fixed annuities and long-term care insurance products.
- Life license is required, and many states require a health license and continuing education in order to offer long term care insurance products

Management⁵

- Recruit and develop your own team of Financial Specialists, Registered Representatives, and Financial Advisors
- Coach, inspire, mentor, and lead through example
- Your continued success and achievement in this role will allow you to work toward promotions to increasingly senior levels of management including Senior Partner, Executive Partner, and ultimately, Managing Partner.
- FINRA/SIE licenses required (7, 63, and 24)

Registered Representative for NYLIFE Securities LLC⁶ (member FINRA/SIPC), a Licensed Insurance Agency

- Financial services practice offering solutions of variable products and mutual funds
- Brokerage services that can help your clients consolidate their investments
- FINRA/SIE licenses required (7 or 6, and 63)

Financial Advisor for Eagle Strategies LLC^{6,7}

- Holistic wealth management advisory practice offering comprehensive fee-based financial planning services and sophisticated investment programs through industry leading partners
- As a fiduciary you will be well positioned to provide trusted guidance and consultative advice to oversee your client's financial future. Differentiate your advisory practice through the power of partnerships of New York Life to offer a broad range of multi-solutions. Be supported by accredited and specialized teams with the flexibility to deliver customized plans to help your clients make complex financial decisions.
- FINRA/SIE license required (7, 63, and 65 or 66)

Name:

Title:

Phone:

Email:

Address:

¹ Based on revenue as reported by Fortune, May 2020. See <http://fortune.com/fortune500>.

² Source: Individual Third-Party Rating Reports as of 9/12/19. Ratings do not pertain to investment products, which fluctuate in value.

³ New York Life leads U.S. membership in the Million Dollar Round Table (MDRT), the Premier Association of Financial Professionals®.

⁴ Source: MDRT, July 2020.

⁵ Managers must meet production and licensing requirements prior to transitioning into management. Series 24 required for certain positions.

⁶ NYLIFE Securities and Eagle Strategies are New York Life companies.

⁷ Qualification requirements include but are not limited to applicable FINRA general securities, agent state law, investment advisory licenses, compliance history, production standards, and required training. Requirements are subject to change.

