



王晶 特许寿险核保师 Jing Wang, CLU®

NYLIFE Securities 注册代表
鹰锐策略 (Eagle Strategies) 公司财务顾问

资产保护/退休及遗产规划/收入保障/人寿保险/商业规划/投资¹

JW Insurance & Finance Services

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王晶女士拥有美国特许寿险核保师 (CLU®) 资格，麻州波士顿东北大学工程理学硕士学位。从业十多年来，王晶女士有着丰富的财务保障规划及金融理财服务经验。王晶女士也是全球人寿保险精英的荣誉组织“百万圆桌”的现任会员²。她致力于帮助客户建立个性化，安全及有效的家庭财产保障规划策略以保障其财务未来。

作为一名特许寿险核保师和理财的专业人士，王晶女士在对如何最大限度的保障家庭资产，降低所得税³，做好退休规划，减少资本风险，建立收入保障以及降低遗产成本方面有很多年的经验。她的客户来自社会的各个层面，不同行业的企业家，专业人士，将要退休及已退休人士。她会对客户整体的财务状况进行了解和分析，与客户共同讨论他们的财务目标和需要承担的责任。王女士运用她丰富的财务知识经验和广泛的保险和理财规划工具，为有资产人士出谋划策，设计出符合个人家庭情况的规划策略，最大限度的帮助他们保存和创造家庭财富。

王晶女士主要的服务内容包括对中高值资产人士的资产规划，退休以及家庭财富传承方案设计，并帮助他们执行稳妥适合的方案。

会员

百万圆桌协会会员² (2007, 2010, 2012-2017)
波士顿遗产规划协会 BEPC
女性保险金融服务协会 WIFS

荣誉

2016-2017	纽约人寿主席委员会特优成就奖
2015	纽约人寿全明星奖
2014	纽约人寿超级明星奖
2012-2015	纽约人寿总裁成就奖
2008-2011	纽约人寿优秀业绩奖
2007	纽约人寿年度新秀奖
2007	纽约人寿总裁成就奖
2004-2006	纽约人寿优秀业绩奖

¹ Investment products are offered through NYLIFE securities LLC (Member of FINRA & SIPC), a Licensed Insurance Agency.

² 百万圆桌协会在国际上被公认为寿险销售业绩卓越的标志。

³ Neither New York Life Insurance Company nor JW Insurance and Financial Services or any of their representatives provides tax, legal, or accounting advice. Please consult your own tax, legal, or accounting professional before making any decisions.

Jing Wang is an agent licensed to sell insurance through New York Life Insurance Company and may be licensed with various other independent unaffiliated insurance companies in the states of MA, CT, NH, RI, FL and TX. No insurance business may be conducted outside the states referenced.

Jing Wang is a Registered Representative of and offers securities products & services through NYLIFE Securities LLC, Member FINRA/SIPC, A Licensed Insurance Agency. In this regard, this communication is strictly intended for individuals residing in the state of MA. No offers may be made or accepted from any resident outside the specific state referenced.

Jing Wang is also a Financial Adviser offering investment advisory services through Eagle Strategies LLC, A Registered Investment Adviser. In this regard this communication is strictly limited to individuals residing in the states of MA and NH. No offers may be made or accepted from any resident outside the specific states referenced.

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