



THE NAUTILUS GROUP®



You have dreams. Aspirations. Goals.

You may want to travel the world, or settle in your own cozy little corner. Or maybe your destination is still unknown. Wherever you are on your journey, we can help you chart your course and navigate your financial future.



You have sophisticated financial needs.

Access to accurate, well-researched information in the complex financial arena is essential for developing clarity and confidence as you secure your family's financial future.

Tax Planning Strategies

Estate & Legacy Planning

Business Succession
& Exit Planning

Retirement Income Planning

Special Needs Planning

Insurance Planning

We provide custom solutions based on a holistic approach.

We offer a wide range of consultative services and technical case design.

▼
Tax
Planning
Strategies

▼
Estate,
Gift & Trust
Planning

▼
Business
Succession &
Exit Planning

▼
Charitable
Planning

▼
Retirement
Income
Planning

▼
Executive
Benefits

▼
Special
Needs
Planning

▼
Life
Insurance
Planning

▼
Asset
Preservation
& Protection

▼
Employee
Benefits





Our Mission

We're here to get to know you, to understand your dreams and aspirations, and to offer you state-of-the-art strategies designed to help turn your goals into reality.

Our Approach

One of the most important differences in the value we provide to our clients is our commitment to a team approach.

We work hand in hand with you, your attorneys, accountants, trust officers, and other advisors.

This team approach provides a holistic picture of your unique financial needs.



Our Process

It starts with understanding what's important to you.

1

Gain a clear understanding of your concerns and objectives.

2

Collaborate with your other professional advisors.

3

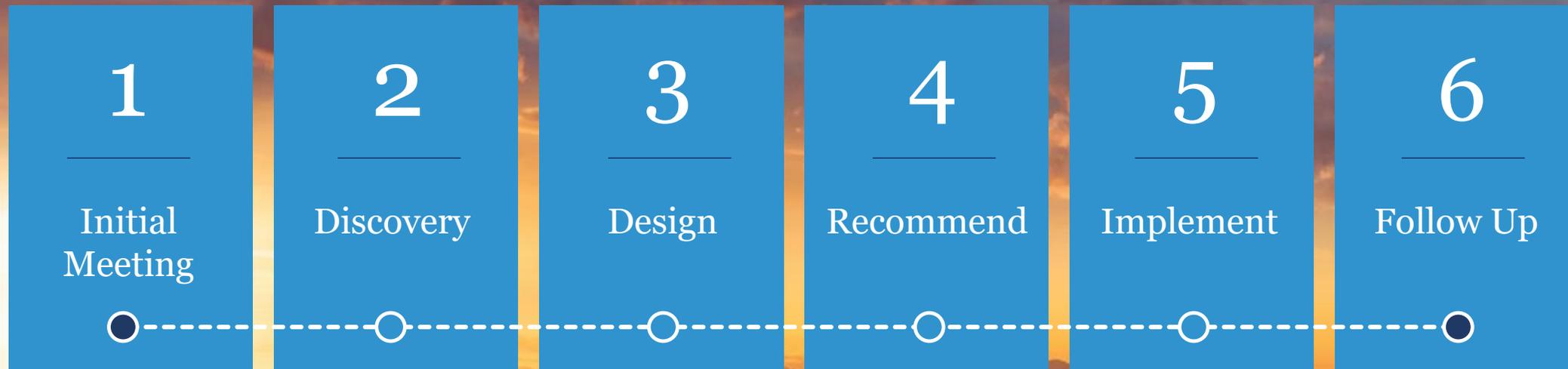
Utilize the industry leading resources of The Nautilus Group.

4

Analyze and project your personal and business financial situations.

Our Process

Through this proven process, we identify goals and analyze potential gaps. We explore possible strategies to achieve your goals and close any gaps. We then work with you for the long term, helping you implement and follow up on your chosen course of action.



Our Clients

The types of clients we can best help are those who prioritize:



Financial
Security



Family
Protection

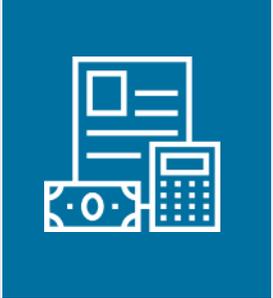


Business
Continuity



Leaving a Legacy for
Future Generations

Our Clients



CPAs



Business Managers



Business Owners



Corporate Executives



Retired Executives



High Net Worth
Individuals &
Families



Professional
Athletes &
Entertainers



Physicians &
Professionals



Attorneys



Farmers & Ranchers

Our Resources

We are proud to partner with New York Life Insurance Company, which enjoys the highest ratings for financial strength.*

For more than 170 years, New York Life has preserved its heritage while evolving and innovating to meet the needs of its clients. New York Life has stayed the course through the economic ups and downs that have defined our nation.



**Individual independent rating agency commentary as of 9/12/2019: A.M. Best (A++), Fitch (AAA), Moody's Investors Service (Aaa), Standard & Poor's (AA+).*





Our Resources

The Nautilus Group[®]

Nautilus Members are carefully chosen from the top tier of financial professionals across the country and given access to a dedicated team of highly qualified planning professionals and resources exclusively designed for their high net worth and affluent clients.



THE
NAUTILUS
GROUP[®]

*The Nautilus Group is a service of New York Life Insurance Company;
membership is limited exclusively to the company's agents.*

Our Resources

Nautilus is staffed by some of the top legal, tax, business succession, philanthropic, executive benefits, and retirement planning experts in the country.



THE
NAUTILUS
GROUP®



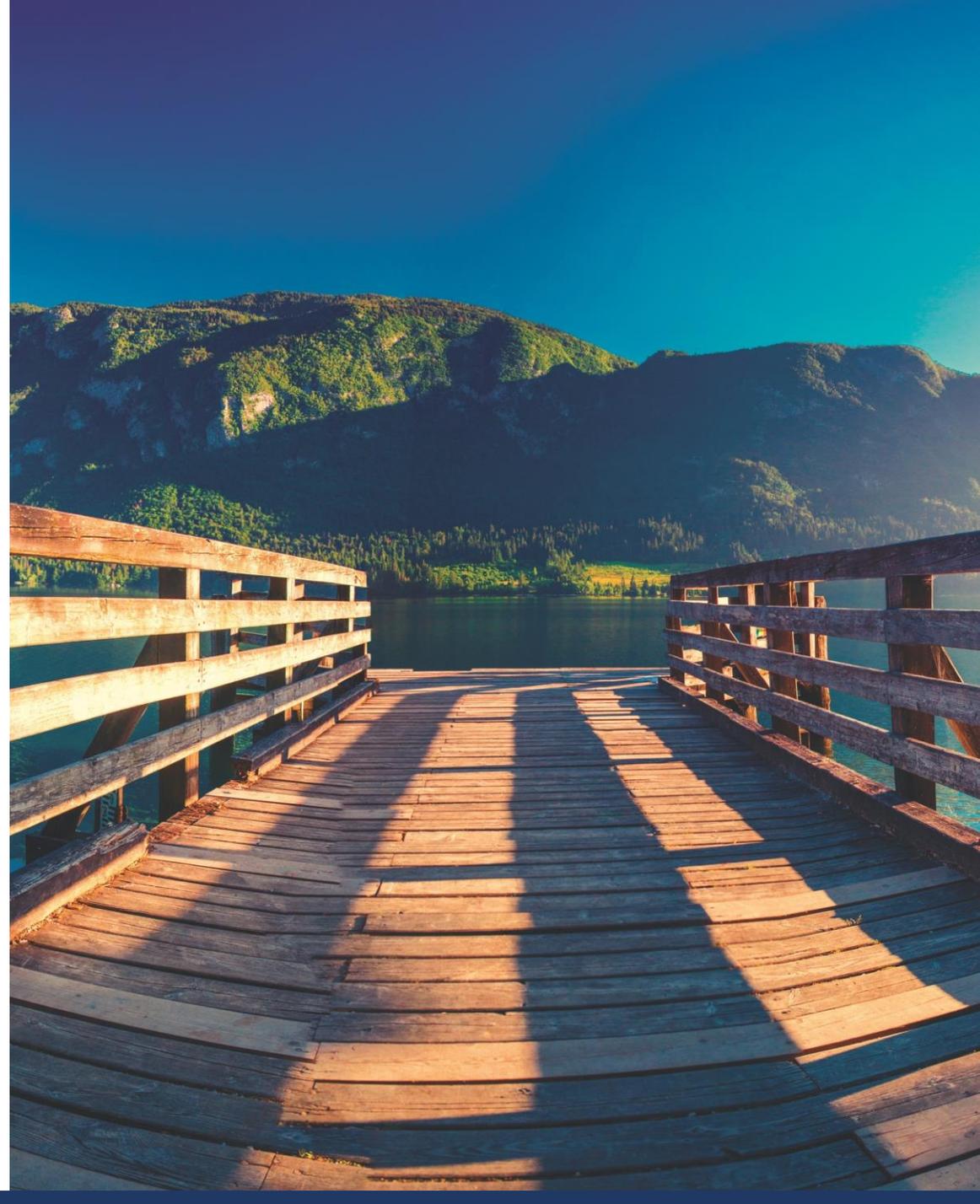
Our Resources

Investment Adviser Representative with Eagle Strategies LLC

Nautilus members who are affiliated with Eagle Strategies can provide fee-based financial planning, investment advisory services, and access to investment management programs—a full spectrum of personalized, professionally managed financial resources.

Eagle
Strategies
LLC

Eagle Strategies LLC is registered with the Securities and Exchange Commission as an "Investment Adviser" and is an indirect, wholly owned subsidiary of New York Life.





Our Resources

Registered Representative of NYLIFE Securities LLC

NYLIFE Securities has the resources needed to provide you with world-class brokerage services and a wide variety of investment options, helping you maximize your opportunities to grow and maintain your wealth.



**NYLIFE
SECURITIES**

NYLIFE Securities LLC is a wholly owned subsidiary of New York Life Insurance Company, (Member FINRA/SIPC) A Licensed Insurance Agency.

Why choose a Nautilus Member Agent?

These values are the bedrock
of our business.

1

Humanity

2

Integrity

3

Financial Strength

We're here for the long term.

We are committed to be here for you, through all the economic ups and downs that will surely come.

Change is inevitable, but we'll be here to help you adjust and adapt your plan, to prepare you for all the rewards—and challenges—the future holds.





We want to be your
trusted financial
professional.

To learn more about us,
visit www.thenautilusgroup.com



*JW INSURANCE &
FINANCIAL SERVICES*

Jing Wang, CLU® JW Insurance & Financial Services



Jing Wang is the principal of JW Insurance and Financial Services, specializing in providing a range of consultative services and presenting state-of-the-art planning strategies and customized case analyses to meet each client's unique requirements and sophisticated planning objectives. Jing is dedicated to meeting her clients' needs with smart thinking, sound analysis, and experienced financial insight, helping them achieve better understanding and peace of mind. Jing earned an M.S. degree in information engineering from Northeastern University. She is a financial advisor with Eagle Strategies LLC, and a registered representative with NYLIFE Securities LLC.

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Jing Wang, Member, The Nautilus Group®, a service of New York Life Insurance Company. Membership is limited exclusively to the company's agents. Registered Representative offering securities through NYLIFE Securities LLC (member FINRA/SIPC), A Licensed Insurance Agency, 201 Jones Road, 5th Floor, Waltham MA 02451 (781) 398-8601. Financial Adviser offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser. New York Life Insurance Company, its affiliates, and agents and employees thereof do not provide legal, tax or accounting advice. Clients are urged to seek the advice of their own professionals before implementing any planning strategies. JW Insurance & Financial Services is not owned or operated by New York Life or its affiliates. SMRU 1834419 Exp. 11.13.2021