



Evelyn M. Tai CPA, CLU®, ChFC®

**Agent, New York Life Insurance Company;
Registered Representative offering securities through NYLIFE Securities LLC,
member FINRA/SIPC, a Licensed Insurance Agency;
Financial Adviser of Eagle Strategies LLC, a Registered Investment Adviser
NYLIFE Securities LLC and Eagle Strategies LLC are New York Life companies.
CA Insurance License #0E33942**

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Mission Statement:

Evelyn is committed to identifying your financial needs and goals; designing financial strategies that are customized to your situation. And as one of only a handful of Chairman's Cabinet agents in New York Life, she has access to resources and solutions designed to help give you the advantages you need. She feels it is a great privilege to be a part of helping you prepare for your financial future.

Evelyn is extremely knowledgeable, professional and is whole-heartedly looking after her clients' best interest. On that account, she works hard to earn their trust. Evelyn specializes in helping business owners and high-net-worth individuals and their families with their unique financial needs. Evelyn is confident that she can provide you with the financial plan that best suits your needs.

Education & Designations:

**Master of Accounting, (University of Houston)
Bachelor of Business Administration,
(National Taiwan University)
Certified Public Accountant CPA#
Chartered Life Underwriter (CLU®)
Chartered Financial Consultant (ChFC®)
Registered Representative of NYLIFE Securities
LLC
Financial Adviser, Eagle Strategies LLC+**

Achievements¹:

- New York Life #1 Female Life Producer (2016)
- New York Life Top 19 Agent (2020)
- New York Life Chairman's Cabinet Award (Top 50 agent for the company (2010-2020)
- New York Life Chairman's Council (1997-2020)
- South Florida General Office 'Agent of the Year' Award (1998, 2000, 2006, 2010, 2013-2019)
- Council President for New York Life South Florida General Office (2004-2007, 2009-2017)
- New York Life 'Annuity Superstar Champion' (2000-2019)

Industry Association Recognition

**Top of the Table member of Million Dollar Round Table (MDRT)* (2013-2020)
Court of the Table member of MDRT (1997-2012)
Qualified Life Member of MDRT (Since 2007)
Qualified Member Since 1996
Member of Broward Chapter of NAIFA**

¹Awards based on sales production.

*MDRT, the Premier Association of Financial Professionals, is recognized globally as the standard of excellence for life insurance sales performance in the insurance and financial services industry.

#Evelyn M. Tai does not offer tax, legal or accounting advice.

+Financial Adviser offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser.