

Jeff R. Shreeves, LUTCF, CLTC
Agent of New York Life Insurance Company
Registered Representative
NYLIFE Securities LLC (member FINRA/SIPC),
A Licensed Insurance Agency
One Valmont Plaza, Suite 100
Omaha, NE 68154 402-496-6450

What I do:

I help my clients achieve their financial goals and objectives. I do this by showing my clients the importance of implementing sound financial strategies. I am able to assist clients with appropriate solutions that may create opportunities for themselves, their family, or their key employees.

How I do it:

I ask questions to determine:

What is your present situation?

What are your goals and objectives?

What ideas have already been brought to your attention by other financial professionals?

What new ideas could be used to help you accomplish your objectives?

What my qualifications are:

Experience	19 years – Insurance, Retirement and Estate Conservation Strategies
Knowledgeable	Specialize in Advanced Retirement & Estate Conservation Strategies, Member of the Council Bluffs Iowa Estate Planning Council and NAIFA National Quality Award & Sales Achievement Award
Designation	LUTCF, CLTC
Successful	Agent of the Year – New York Life’s Nebraska General Office for 2012, 2013 & 2014, Lifetime & Qualifying Member of the Million Dollar Round Table and Court of the Table for 2015, New York Life’s Chairman’s Council in 2015, LifeStar MVP & Annuity Diamond Elite Champ for 2015
Service	Member of National Association of Insurance & Financial Advisors – Omaha, NE, and Member of Omaha Executive Association – Omaha, NE

My Pledge to my Clients:

To help and work with my clients in building a team of professionals that can assist them in achieving their financial independence.