

宋曼萍 會計師,特考壽險核保師,特考財務顧問 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

Office: (954) 958-4246 Cell: (561) 251-2105 Fax: (954) 958-4255

Address: 1300 Concord Ter, 5th Floor Sunrise, FL 33323

宋曼萍承諾與您一起確定您個人的財務需求及目標,為您量身設計適合您的財務策劃,並在隨後的歲月裡提供最優質的專業服務,協助您實現您的財務及保險目標。宋曼萍專業知識極為豐富,全心為客戶的需求及利益著想,因而贏得了廣大客戶的信任。宋曼萍特別專長於幫助企業擁有人及高資產個人及家庭的特別財務需求。宋曼萍深信她能提供您所需要的,最優質的財務策劃方案

成就:

- 紐約人壽超級明星獎 (2010-2014)
- 紐約人壽最高成就獎 (1997-2014)
- 南佛州分公司年度最佳保險經紀人 (1998,2000, 2006, 2010, 2013)
- 南佛州分公司銷售冠軍 (2004-2007, 2009-2013)
- 紐約人壽年金明星冠軍 (2000-2014)
- 紐約人壽壽險明星 (2000-2014)
- 紐約人壽年度百單經紀人獎 (1998-2014)
- 紐約人壽年度業務代表新人獎 (1997-1998)

學歷和証書:

國立台灣大學商學學士 德州大學稅務碩士 美國註冊會計師[#] 特考壽險核保師 特考財務顧問 NYLIFE Securities 註冊代表 Eagle Strategies LLC 財務顧問+

Email: etai@ft.newyorklife.com

會員:

百萬圓桌協會會員*(1996-2014) 百萬圓桌協會終身會員(2007 開始) 精英席位 (1997-2012) 頂尖席位(2012-2014) 美國保險財務顧問協會 Broward 分會會員 美國會計師協會會員# 佛州會計師協會會員#

- * 百萬圓桌協會在國際上被公認為壽險銷售業績卓越的標誌
- # 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

The offering documents for all New York Life and its subsidiaries' products are available only in English. In the event of a dispute, the provisions in the policies and contracts will prevail.

對於保單, 合約等相關文件, 紐約人壽及其子公司僅提供英文版本。如有爭議, 一律以保單和合約中的條款為准。

Evelyn M Tai, CPA, CLU[®], ChFC[®] 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 AR (AR Ins. Lic. 309791), CA (Ca Ins Lic. 0E33942), FL, GA, NJ, NY, TX, and WA. No insurance business may be conducted outside of these states referenced.

Evelyn M Tai, CPA, CLU[®], ChFC[®] is a Registered Representative of and offers securities products & services through NYLIFE Securities LLC, Member FINRA/SIPC, a licensed insurance agency located at 1300 Concord Terrace, Sunrise, FL 33323, (954) 358-4246. In this regard, this communication is strictly intended for individuals residing in the states of AR, CA, FL, GA, NJ, NY, and WA. No offers may be made or accepted from any resident outside the specific state referenced.

Evelyn Tai is also separately registered as an investment adviser representative with Eagle Strategies LLC, a Registered Investment Adviser, offering advisory services in the states of FL, CA, GA, KS, NJ, NY and WA.

NYLIFE Securities LLC and Eagle Strategies LLC are wholly-owned subsidiaries of New York Life Insurance Company. As such, these services are strictly intended for individuals residing in the specific states referenced.

SMRU 524684