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.

1. Initial Meeting
2. Discovery
3. Design
4. Recommend
5. Implement
6. Follow Up

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 has received the highest financial strength ratings currently awarded to a U.S. life insurer.*

For more than 175 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 06/22/22: 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.

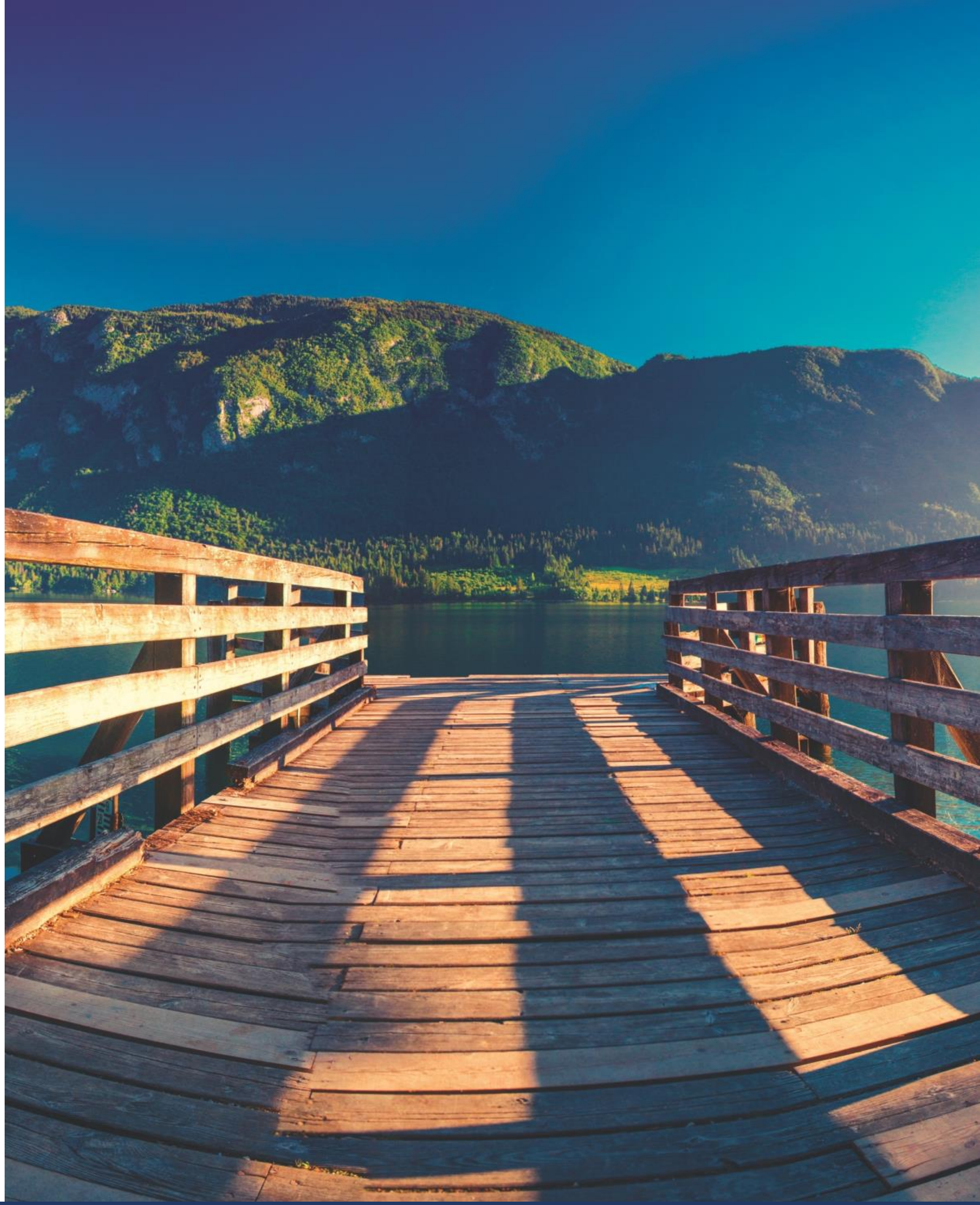
Our Resources

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.

NEW YORK LIFE

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?

1. Resources
2. Education
3. Professionalism

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, visit www.thenautilusgroup.com

Mitch Rosenberg, CFP®, CLU®, MSFS, AEP®

MDR Insurance and Financial Services

Mitch specializes in investment management and holistic planning for life, disability and long-term care insurance, business succession, charitable, estate, executive benefits, and financial and tax strategies. He serves a diverse clientele including business owners, professionals, corporate executives, real estate owners, high net worth individuals, families, physicians, professional athletes, and entertainers. Mitch is a well-respected resource and trusted advisor to other professionals. Mitch graduated Phi Beta Kappa from the University of California, Berkeley, Haas School of Business.

889 Pierce Court, Suite 102
Thousand Oaks, CA 91360
805-494-4525
mdrosenberg@eaglestrategies.com
www.PLANNOW.net
CA Insurance license #0698571