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ROSENBERG NAMED A TOP SOUTHERN CALIFORNIA FINANCIAL SERVICES PROFESSIONAL

THOUSAND OAKS, Calif. – Forbes and SHOOK Research have named Mitch Rosenberg, CFP®, CLU®, MSFS, AEP®, a top professional in Southern California's financial industry. The prestigious designation recognizes the results-driven leadership of Rosenberg, the founder of MDR Insurance & Financial Services in Thousand Oaks.

Stocks may be trending down as of late and there are signs of a pending recession, but Rosenberg joins a distinguished group of leaders Forbes and SHOOK said have managed to "keep their clients calm and, more importantly, help preserve their wealth."

Rosenberg has been doing this well over three decades.

SHOOK Research is an organization comprised of high-performing financial professionals and financial industry leaders across the country. It partners with Forbes in making the rankings, which include an analysis of quantitative *and* qualitative criteria. A financial plan, after all, isn't just a document – it's an expression of personal and family values, aspirations, security, and the future.

Importantly, the ranking criteria considers an important question: "Would we recommend these professionals to a family member or a friend?"

In the case of Rosenberg, whose career spans three decades and continues growing, the answer was a resounding yes. Rosenberg's success has been repeatedly recognized; he was recently named to both the Pacific Coast Business Times "Who's Who in Finance" and "Who's Who in Insurance Services" lists; and New York Life's Chairman's Cabinet, recognizing The Top 50 out of more than 13,000 elite agents at the company. Council is an annual company recognition program based on agent production from July 1- June 30.

Find Rosenberg among the select few named in Southern California here and learn more about the Forbes/SHOOK Research methodology here.

Rosenberg is a Certified Financial Planner™, Chartered Life Underwriter®, an AEP®, and a degreed Master of Science in Financial Services. He's also a founding member of the Los Angeles chapter of the Haas School of Business at UC Berkeley Alumni Network where he earned his B.S. in Finance and Accounting in 1983. His desire to continuously grow and improve led him to pursue his Master of Science in Financial Services from the American College of Financial Services in 1997.

Rosenberg is a member and former President of the Conejo Valley Estate Planning Council and the Woodland Hills Estate and Tax Planning Council. He enjoys golf, travel, and spending time with his wife, three children and golden retriever, Rosie.

The mission of MDR Insurance & Financial Services is to provide business, estate, insurance, and financial planning to business owners, successful individuals and affluent families. They help their clients crystallize their objectives and then work with them and their advisors to take action to implement their customized plan. They are the catalyst and coordinators in the planning process.

For more information, visit www.plannow.net, call Mitch Rosenberg at 805-494-4525 or email him at mdrosenberg@eaglestrategies.com. Mitch Rosenberg (CA Insurance License #0698571) is an agent licensed to sell insurance through New York Life Insurance Company and may be licensed to sell insurance with various other independent unaffiliated insurance companies. He also is an Investment Adviser Representative with Eagle Strategies LLC, a Registered Investment Adviser and a Registered Representative of and offers securities products and services through NYLIFE Securities LLC, Member FINRA/SIPC, a licensed insurance agency. MDR Insurance & Financial Services is not owned or operated by New York Life Insurance Company or its affiliates.

Data provided by SHOOK®Research, LLC. Data as of 12/31/21.
Source: Forbes.com(July, 2022).
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