Helping Clients Prepare for Life's Inevitable Changes With Insight and Compassion

Barry L. Finkelstein, Ph.D., MSFS, CFP®, CLU® | New York Life

It doesn't take a Ph.D. to know that changes and challenges are an inevitable part of every life.

But Barry Finkelstein believes his advanced studies and extensive reading in literature, philosophy and religion — along with 35 years in the insurance and financial services business — have given him unique insights into the human condition and deep compassion for his clients and their concerns.

Celebrating the Past, Looking Toward the Future: Barry Finkelstein celebrated his first 35 years in financial services – and sought input for the next 35 years – at a recent client appreciation dinner.

Mr. Finkelstein, a financial advisor with Eagle Strategies LLC, a registered investment advisor, is a rare breed. As both an insurance agent and financial planner, he has helped many clients of different ages and backgrounds prepare for and navigate life's transitions and milestones. He is also a lifelong learner, who continually seeks to increase his knowledge of the industry to better serve his clients' needs. This is evidenced not only by Mr. Finkelstein's wide array of professional designations, but in the strong and lasting relationships he builds with his clients.

Among his clients are business owners — who look to him for help with succession planning, executive benefits and buy-sell funding — as well as professionals in a diverse range of fields who seek his assistance with personal financial and estate planning.

"My clients tend to be serious-minded people who recognize their vulnerabilities in life; who care about their families, their businesses and their own futures; who have the financial capacity to implement a sound financial plan; and who are open to guidance from a hard-working, sincere, knowledgeable advisor," Mr. Finkelstein says.

Lifelong Learner

- Ph.D. in Comparative Literature (University of Wisconsin-Madison)
- Master of Science in Financial Services (MSFS)
- Chartered Life Underwriter (CLU®)
- Chartered Financial Consultant (ChFC)
- Certified Financial Planner (CFP®)
- Registered Employee Benefits Consultant (REBC)
- Registered Health Underwriter (RHU)
- Chartered Advisor for Senior Living (CASL)
- Chartered Advisor in Philanthropy (CAP)

New York Life Is His Kind of Company

Mr. Finkelstein is proud of his affiliation with New York Life Insurance Company, and of the company's longevity, quality and loyalty to its clients. In addition to being a source of life insurance, long-term care insurance and annuities*, New York Life offers a wide variety of investment programs through its subsidiary Eagle Strategies LLC, a registered investment advisor.

"Over the last 168 years," Mr. Finkelstein says, "New York Life has withstood the Civil War, the Great Depression, two world wars and the financial crisis of 2008. It has emerged as one of the very few AAA-rated companies in our industry." Equally important, in Mr. Finkelstein's view, is New York Life's mutuality: The company is owned by policyholders, not stockholders. "Unlike some of its competitors, New York Life has 100 percent allegiance to its policyholders. That's totally in alignment with my dedication to my clients."

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*Fixed annuities issued by New York Life Insurance and Annuity Corporation. Variable annuities are registered products offered through NYLIFE Securities LLC, Member FINRA/SIPC