



# Evelyn M. Tai CPA, CLU<sup>®</sup>, ChFC<sup>®</sup>

Agent, New York Life Insurance Company;  
Registered Representative<sup>+</sup>, Financial Adviser<sup>^</sup>  
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## Mission Statement:

Evelyn received Master of Taxation from University of Houston. Evelyn holds the Certified Public Accountant (CPA#), Chartered Life Underwriter<sup>®</sup> (CLU<sup>®</sup>) and Chartered Financial Consultant<sup>®</sup> (ChFC<sup>®</sup>) designations.

For the past 30 years, Evelyn has been helping business owners and high net worth individuals and their families with their unique financial needs. She provides holistic solutions by integrating Investment, Insurance and Taxes Savings<sup>#</sup> strategies to help clients with estate conservation, retirement planning, college funding, insurance protection, employee benefit, and other personal or business financial needs. Due to the trust and support of her clients, Evelyn has continuously received numerous industry awards for her performance, including being a "Top of the table" and Lifetime member of the "Million Dollar Round Table (MDRT)\*" and New York Life's "Chairman Cabinet Award", "Annuity Superstar Champion" and "Agent of the Year" Award for the South Florida Office<sup>1</sup>.

## Achievements<sup>1</sup>:

- New York Life #1 Female Life Producer (2016)
- New York Life Top 28 Agent (2022)
- New York Life Chairman's Cabinet Award (2010-2022)
- New York Life Chairman's Council (1997-2010,2023)
- South Florida General Office 'Agent of the Year' Award (1998, 2000, 2004-2007, 2009-2019,2021-2023)
- New York Life 'Annuity Superstar Champion' (2000-2019, 2021)

## Industry Association Recognition

- Top of the Table member of the Million Dollar Round Table (MDRT)\* (2013-2022)
- Court of the Table member of MDRT (1997-2013)
- MDRT Life Member of MDRT
- MDRT Member (1996 – 2022)
- Member of Broward Chapter of The National Association of Insurance & Financial Advisors (NAIFA)

## Education & Designations:

Master of Accounting, (University of Houston)  
Bachelor of Business Administration,  
(National Taiwan University)  
Certified Public Accountant CPA<sup>#</sup>  
Chartered Life Underwriter (CLU<sup>®</sup>)  
Chartered Financial Consultant (ChFC<sup>®</sup>)  
Registered Representative of NYLIFE  
Securities LLC<sup>+</sup>  
Financial Adviser, Eagle Strategies LLC<sup>^</sup>

<sup>1</sup> Awards based on sales production.

\*MDRT, the Premier Association of Financial Professionals<sup>®</sup>, is recognized globally as the standard of excellence for life insurance sales performance in the insurance and financial services industry.

<sup>#</sup>Evelyn M. Tai does not offer tax, legal or accounting advice.

<sup>+</sup> Registered Representative offering securities through NYLIFE Securities LLC, member FINRA/SIPC, a Licensed Insurance Agency

<sup>^</sup>Financial Adviser offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser

NYLIFE Securities LLC and Eagle Strategies LLC are New York Life companies.