

Lisa Youk - Financial Advisor*

*Eagle Strategies LLC . NYLIFE Securities LLC . New York Life Insurance Co.



At-a-Glance: Lisa Youk

Why choose Lisa as your financial and investment advisor? Results driven, she goes that extra mile to make sure your goals are met. When the market is down, she will be right there with you to address any concerns and re-evaluate your goals. Witnessing her clients go through the milestones of their lives, while knowing she was there to listen, help and adapt to their needs, is one of the biggest rewards for her. This is why she is enthusiastic about helping her clients and why she loves her job. Whether you're planning for retirement or presently going through it, you need someone whom you can trust, someone who has your back.

Lisa's vision is to provide empowerment through education and guidance by building a reliable and trustworthy financial practice.

Mission Statement:

Lisa is passionate about being a trusted resource to help individuals, families and business owners make informative decisions for their investments, financial goals and retirement strategies.

Lisa's Process:

Navigating the financial markets can be cumbersome and overwhelming. Through a series of thoughtful conversations, Lisa will take you through a holistic process. She can help you determine your goals, identify pitfalls and provide suggestions on meeting your financial and retirement strategies. Even in changing times, she will make adjustments to your financial plan. She provides solid and sound financial advice that can help you sleep better at night, so you have more time to enjoy what is most important to you.

Lisa can help you meet your financial goals and dreams ranging from:

- Investment, financial and wealth advising
- Financial strategies to meet various life goals; wealth accumulation and retirement distribution
- Estate planning (collaboration with your tax and legal consultants); retirement strategies
- Planning for the business owner
- College funding, mutual funds and portfolios managed by third party professionals with investments in stocks, bonds, mutual funds and ETFs
- Fixed and variable annuities
- Life insurance, long term care insurance, disability insurance and employee benefits

Agent for New York Life Insurance Company

Registered Representative through NYLIFE Securities LLC (Member FINRA/SIPC) a Licensed Insurance Agency.

*Financial Adviser offering investment advisory services through Eagle Strategies, LLC, A Registered Investment Adviser.

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Neither New York Life nor any of its agents are in the business of offering tax, legal or accounting advice. You should consult with your professional advisors for tax, legal or accounting advice.