



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.

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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.

Retirement Income Planning

Tax Planning Strategies

Estate & Legacy Planning

Business Succession  
& Exit Planning

Insurance Planning

Special Needs Planning

# We provide custom solutions based on a holistic approach.

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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

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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

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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

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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.

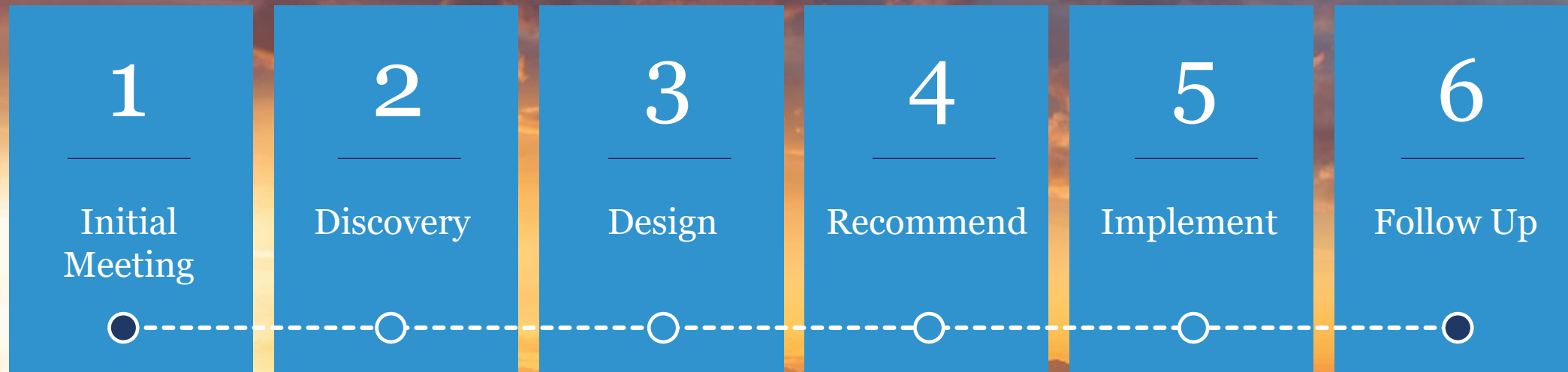
4

Analyze and project your personal and business financial situations.

# Our Process

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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.



# Our Clients

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The types of clients we can best help are those who prioritize:



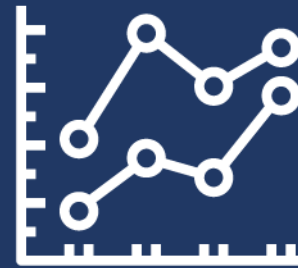
Financial  
Security

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Family  
Protection

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Business  
Continuity

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Leaving a Legacy for  
Future Generations

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# Our Clients

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High Net Worth  
Individuals &  
Families



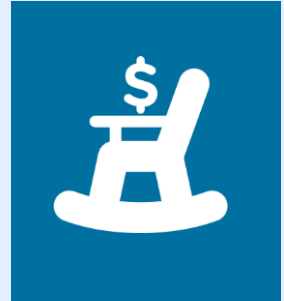
Business Managers



Business Owners



Corporate Executives



Retired Executives



Physicians &  
Professionals



Professional  
Athletes &  
Entertainers



CPAs



Attorneys



Farmers & Ranchers

# Our Resources

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We are proud to partner with New York Life Insurance Company, which enjoys the highest ratings for financial strength currently awarded to a life insurance company.\*

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 11/17/23: A.M. Best (A++), Fitch (AAA), Moody's Investors Service (Aaa), Standard & Poor's (AA+).*





# Our Resources

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## 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

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THE  
NAUTILUS  
GROUP®

Nautilus is staffed by some of the top legal, tax, business succession, philanthropic, executive benefits, and retirement planning experts in the country.



# Our Resources

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## 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.*



# Why choose a Nautilus Member Agent?

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These values are the bedrock  
of our business.

1

Resources

2

Education

3

Professionalism

# We're here for the long term.

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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.

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To learn more about us,  
visit [www.breedfinancial.com](http://www.breedfinancial.com)



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## Tyler Breed, J.D.

### Eagle Strategies, LLC

Tyler Breed is a Financial Adviser helping clients with custom tailored solutions for retirement planning, estate conservation, college funding, insurance protection, and other personal or business financial needs since 2014. With his previous experience as an attorney, Tyler has a unique perspective on the importance of careful planning and attention to detail. He is dedicated to providing a knowledgeable and explanatory approach to helping his clients protect and secure their financial futures through tailored strategies based on their unique goals.

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