



Coalition of Agencies in Service to the Elderly Bio Information Form

Date: **Jan 8 2019**

Name: **Kathleen M Flynn, MBA**

Title: **Financial Advisor and Licensed Insurance Agent**

Agency Name: **New York Life/AARP dba Longevity Financial**

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What age range do you serve? **Serve all ages with a focus on preparing for retirement**

A brief description of your position: **Provide personal advice and guidance on financial planning matters, including healthcare (Medicare plan assessment and enrollment and Long Term Care planning), organizing and managing your finances, asset protection strategies, social security decisionmaking and retirement planning.**

A brief description of what your agency does:

New York Life: life insurance, long term care, mutual funds, brokerage account management, investment advisory services, fee-based financial plans, immediate and deferred annuities, disability insurance.

Please list any other programs your agency provides:

New York Life has a partnership with AARP Services Inc to provide members with financial guidance for long term care planning, and life insurance and annuity products.

C.A.S.E.
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