2018 Annual Letter

MESSAGE FROM LIZZIE DIPP METZGER

For several years now, I have been privileged to share with you all the exciting developments that we have made at Crown from the previous year. Well this past year was a year that is one for the record books. We have had a year of wonderful accomplishments and growth, and every change is not only because of our wonderful clients but also benefits you and those you love as well. I'd like to thank you for giving me the opportunity to continue working with you. The Crown Wealth Strategies family appreciates your business and loyalty. Our continuous goal is to provide superior service and to constantly improve. Above all, working in your best interest remains our top priority and we will remain committed to making every effort to maintain your trust and satisfaction.

COUNCIL PRESIDENT

In the past year I received the once in a lifetime honor of being named the New York Life Council President. This truly has been the pinnacle of my career thus far. I was privileged to speak to over 7,000 council agents to share our story and to express why we believe our rise to success is entirely due to our singular focus on the client relationship. I would like to share the three rules I shared with them that we live by when working with each of you:

1) NO Excuses
2) It's Never about us – it's always about the client
3) It takes a TEAM

Although it was wonderful sharing this achievement with my peers and my family, the best part of being Council President are the additional resources I bring to you through this achievement. I am now part of the Advisory Board of Directors (ABD) at New York Life, allowing me to meet with top management twice a year at this Fortune 100 company and to effectively advocate for my clients. I am also a Nautilus Plus member which grants me unmatched access to an elite team of experts in estate and business planning. These resources allow us to provide higher quality of service and materials, planning solutions customized to the client, and advanced technological capabilities.

BRIAN METZGER JOINS CROWN AS PRESIDENT OF BUSINESS DEVELOPMENT

We couldn't be more thrilled to welcome Brian to the Crown family! Brian Metzger, my husband of 18 years, has joined Crown as President of Business Development. As an award-winning financial services executive and former Partner at New York Life's El Paso General Office, we could not find a better suited person to help us with our expansion efforts.

This strategy will including opening and training professionals in our new offices to include our own Crown Wealth Strategies Building, a cutting-edge diversified financial center in El Paso for corporations, physicians, business owners and families.

Brian brings to Crown Wealth Strategies a singular combination of credentialed financial expertise and proven management experience. He will enable us to scale our unique business model providing world-class wealth strategies and estate planning to our clients on a highly customized basis.

CROWN EXPANSION

For a very long time, we have thought about the best way to be able to expand our services to a larger audience. We believe what we are doing at Crown is revolutionary, a commitment to helping a client achieve their goals in a comprehensive, holistic manner. Rather than choosing to ignore the technological tools available, we are embracing them to bring the best of technology combined with a hands-on approach to planning. It has been crucial to me that we serve a wide variety of clients, from those just starting out to those selling their business or in retirement. As such, we realized the time was right to take a bold step towards the future.

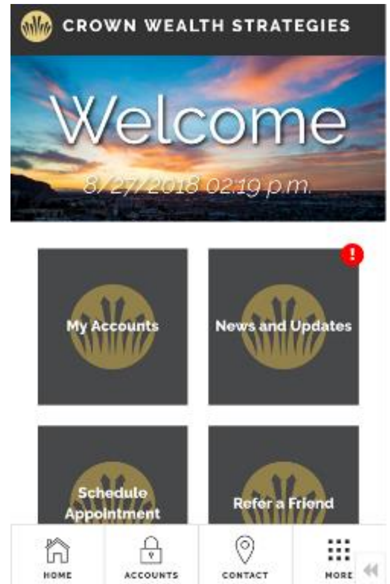
Our expansion has taken two routes, through a brand-new Employee Benefits & Protection Practice in downtown El Paso as well as a new Wealth Strategies, Business, and Estate Planning facility on the West Side.

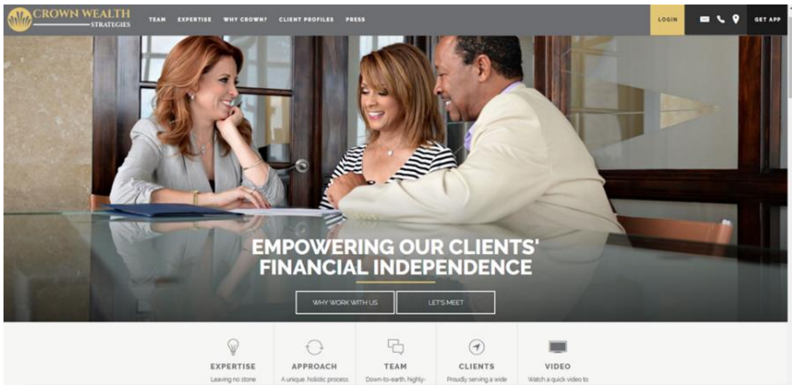
In downtown we will lead an initial team of licensed New York Life Insurance agents in the freshly renovated office and meeting space, where they will deliver employee benefits and worksite offerings to business leaders and their employees. Our new West Side facility allows us the space to add other advisors who focus on planning and wealth strategies.

This launch is the latest expansion of our vision to meet a full range of clients' financial needs. Crown Wealth has always integrated investment and insurance strategies to help accumulate and preserve individual and family wealth. Now we have the space and the team to continue to grow the reach of what we do regionally and nationally.

WE HAVE AN APP FOR THAT!

On top of a total revamp of our website this past year (please visit us at www.crownws.com , we have developed an App for our clients to have better access to all of their accounts. This one of a kind app will give you news, easy access to your planning and financial accounts, and the ability to reach out for information anytime. Please visit our new website to download the app today!





ACHIEVEMENTS

We are so proud to announce that Emikoryo "Ryo" Perkins, Director of Operations, has become a Registered Service Assistant by passing the Series 6 and 63 exams administered by the Financial Industry Regulatory Authority (FINRA). Ryo can now provide you with service relating to registered products. Our staff are dedicated to expanding their breadth of knowledge to better serve our clients.

SERVICE. ACCOUNTABILITY. VALUE. EDUCATION. (S.A.V.E.)

It has been two years since we made a commitment to our clients through our S.A.V.E. program. We hope you are satisfied with this outreach and would love to hear your feedback. Last year we brought both a social security expert as well as tax expert to share ideas with you. Above all we remain committed to making every effort to maintain your confidence and satisfaction.

S·A·V·E
Service·Accountability·Value·Education

Thank you again for allowing us the opportunity to help you achieve your financial goals and for your trust. We remain committed to growing and improving our practice to ensure we offer you the best service. Please contact me if I can be of further assistance

LIZZIE DIPP METZGER, CFP®, AEP®, MSFS
Financial Adviser*

Crown Wealth Strategies

CONTACT US:
4907 Crossroads Dr, Suite A

El Paso, TX 79922

(915) 613-4300

• Member Agent, The Nautilus Group®, a service of New York Life Insurance Company - www.TheNautilusGroup.com
• Financial Adviser offering investment advisory services through Eagle Strategies, a Registered Investment Adviser.
• Registered Representative offering securities through NYLIFE Securities LLC, Member FINRA/SIPC, a Licensed Insurance Agency,
• 303 N. Oregon Suite 1100 El Paso TX 79901 • 915-534-3200
• Crown Wealth Strategies is neither affiliated with or owned by New York Life or its subsidiaries.
• If you do not wish to receive email communications from New York Life Insurance Company or its affiliates, please reply to this email, using the words "Opt out" in the subject line. Please copy email_optout@newyorklife.com New York Life Insurance Company, 51 Madison Ave., New York, NY 10010