



Quarterly Women's Newsletter - January, 2024

What You Can Expect in This Women's Newsletter:

- **5 Surprising Facts About Women Investors**
- **RSVP to Our Galentine's Chat & Dinner**
- **How to Get Your Finances Back on Track After a "Gray Divorce"**
- **Join the Legacy Letter Challenge**
- **Help Us Celebrate 25 Years of Taylor Financial Group**
- **Looking Back Through Our 2023 Women's Events**
- **Keeping Up with TFG**

5 Surprising Facts About Women Investors



Three new studies have uncovered actionable facts about how women invest that surprised even this 25-year veteran and female advisor.

As a mother, a daughter and a woman who founded her own advisor firm 25 years ago, I would think that I understand the needs of women. Yet these studies all went deeper than the typical platitudes (women are more conservative than men, women listen better), and identified some key areas that even I was able to learn from on a professional level.

These insights will enable me to even better understand the needs of my women prospects and clients. So, let's take a look.

[Read the Article](#)

RSVP To Our Galentine's Chat & Dinner



Will you be our Galentine? Join us for a women's chat and dinner event at 4:30pm on February 11th at 54 Woodmere Road, Upper Saddle River, NJ 07458.

RSVP by February 4th to Evelyn at epoweska@taylorfinancialgroup.com

How to Get Your Finances Back on Track After a "Gray

Divorce"



First there was Al and Tipper Gore. Then Bill and Melinda Gates. **Divorce after the age of 50 is no longer so rare.**

From 1990 to 2010, the divorce rate for people over 50 doubled. It's leveled off somewhat, but continues to rise for people over 65. **Longer life expectancies, economic gains for women, and reduced stigma have all contributed to the phenomenon of "gray divorce."**

But divorce at this age comes with a unique set of challenges. **To keep your finances on track, here are five things to keep in mind.**

[Read the Article](#)

Join the Legacy Letter Challenge



This year we hosted a women's event that focused on joining the Legacy Letter

challenge. The challenge is for 1 million dads and moms write at least one well written, meaningful, lasting Legacy Letter to their children.

By writing a Legacy Letter to your spouse, child, grandchild, or friend, you are connecting with the people closest to you on a deeper level by writing a letter from your heart.

[Join the Challenge](#)

Help Us Celebrate 25 Years!

Can you believe it has been 25 years since Debbie founded Taylor Financial Group?

Throughout the year we will be celebrating this milestone. Taylor Financial Group's growth and success are due, in large part, to your confidence in us. As part of the celebration, we want to showcase some of our loyal clients monthly in our Weekly Updates and Social Media posts.

We would love to schedule a 20-minute Zoom Celebration interview to hear about your journey with us (and ask the below questions). If

you do not have time for a Zoom Celebration interview, completing the below form and sending back answers to the interview questions so you can still be featured in our posts may be a better option.

If you want to participate in our 25th Anniversary celebration, contact Jessica to schedule your Zoom Celebration interview or send her your completed form from the link below to be one of our featured clients.

jbeutel@taylorfinancialgroup.com

[Click For Featured Client Form](#)



Looking Back Through 2023



This year, Taylor Financial Group hosted monthly women's events to build community and have some fun! Some of the most popular events include a pizza making class, Greek cooking class with Chef Angie, and our holiday event.

We received tons of positive feedback from you all on our events, and we plan to continue with our women's events in 2024.

We are deeply committed to empowering women by holding events, providing continued education, and building community.





Keeping Up with TFG



Every year, our office does a cookie exchange with huge success! Jenn made her famous gingerbread cookies ([link here](#)) and I am ashamed to say that I ate 6 of her

cookies in 1 day.

We also hosted a gift exchange, and Jared came away with a whole new outfit (peep the Jets crocs as his shoes)!

Jenn also got lots of gifts and Debbie was very excited for her.

CONTACT US!

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A diversified portfolio does not assure a profit or protect against loss in a declining market.

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Investors cannot invest directly in indexes. The performance of any index is not indicative of the performance of any investment and does not take into account the effects of inflation and the fees and expenses associated with investing.

Distributions from traditional IRAs and employer sponsored retirement plans are taxed as ordinary income and, if taken prior to reaching age 59½, may be subject to an additional 10% IRS tax penalty. A Roth IRA offers tax free withdrawals on taxable contributions. To qualify for the tax-free and penalty-free withdrawal of earnings, a Roth IRA must be in place for at least five tax years, and the distribution must take place after age 59½ or due to death, disability, or a first time home purchase (up to a \$10,000 lifetime maximum). Depending on state law, Roth IRA distributions may be subject to state taxes.

Re-balancing may be a taxable event. Before you take any specific action be sure to consult with your tax professional.

Asset allocation, which is driven by complex mathematical models, cannot eliminate the risk of fluctuating prices and uncertain returns.

Russell 1000® Value Index measures the performance of those Russell 1000 companies with lower price-to-book ratios and lower I/B/E/S forecasted growth values. The index is market cap-weighted and includes only common stocks incorporated in the United States and its territories.

The S&P 500 is a capitalization weighted index of 500 stocks designed to measure performance of the broad domestic economy through changes in the aggregate market value of 500 stocks representing all major industries.

Bloomberg U.S. Aggregate Bond - The Bloomberg US Agg Total Return Value Unhedged, also known as "Bloomberg U.S. Aggregate Bond Index" formerly known as the "Barclays Capital U.S. Aggregate Bond Index", and prior to that, "Lehman Aggregate Bond Index," is a broad-based flagship benchmark that measures the investment grade, US dollar-denominated, fixed-rate taxable bond market. The index includes Treasuries, government-related and corporate securities, MBS (agency fixed-rate pass-throughs), ABS and CMBS (agency and non-agency).

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