25TH ANNIVERSARY

TAYLOR FINANCIAL GROUP, LLC

THE RIGHT PARTNER CAN MAKE ALL THE DIFFERENCE

CELEBRATING 25 YEARS!

Announcement

February 9, 2024

Are you confused about your 401(k)?
Are you unhappy with your returns?

Start the New Year off right and get your finances under control!

Stop neglecting your 401(k) and let Taylor Financial Group help manage it for you.

Click Here To Email Jared Marzocco, Senior Client Service Associate, to learn more about taking advantage of this new offering

If you are retired (lucky you!) and no longer contribute to a 401(k), we would love to extend this service option to your children.

Even if your children have just entered the workforce, actively managing 401(k) investments is essential to helping build a robust retirement account.

Please forward them this email, to take advantage of this new offer!

Click Here To Use Our 401(k) Calculator

Your 401(k) or 403(b) is likely one of your most significant sources of retirement income, but retirement accounts can be among the most confusing (and therefore overlooked).

We understand that our clients want more guidance when it comes to these vital investment vehicles. We are now offering the ability to combine these accounts with your other accounts at TFG, allowing them to be managed in one place.

Retirement By Design is a powerful management platform we use that allows us to seamlessly incorporate your retirement assets and your other assets into your holistic financial plan. Even better – we can review your allocations and make trades in the accounts on your behalf that align with your long-term strategy. Let TFG help make sure you're on track and leave the work to us.

With this tool, we can:

- **Review contributions, distributions, and trade activity**
- **Monitor your accounts and make changes when necessary**
- **Trade on your behalf**
- **Take into account your risk profile and goals**
- **Execute asset allocation changes as needed**
- **Create a strategy that addresses all of your accounts**
- **Combine accounts onto one statement, so it's easier to manage**
- **And more!**

As you know, professionally managed accounts may translate to significantly more wealth in your golden years. That's why we're proud to offer this valuable service to our clients.

Please email Jared Marzocco, Senior Client Service Associate at jmarzocco@taylorfinancialgroup.com, or give Jared a call at (201) 485-8494 to learn more about taking advantage of this new offering. We are happy to discuss how this service can benefit your accounts or the accounts of your children.

Please don't hesitate to call our office to speak to us about this new service or anything else you have on your mind. We are here to help you and your family in any way we can.

Click Here To Email Jared

Thanks and Regards,

Debra Taylor

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