25TH ANNIVERSARY

TAYLOR FINANCIAL GROUP, LLC
THE RIGHT PARTNER CAN MAKE ALL THE DIFFERENCE

The Taylor Financial Group Difference

Where your tax, estate and investment planning are handled in one place	TFG	A similar Independent & Fee-only Firm	DIY + Robo (Betterment + Wealthfront)	Traditional Investment Advisor
Implement a diversified portfolio	★	✓	✓	✓
Implement a holistic and tax-efficient portfolio	★	✓	✓	
Advice on important life decisions like buying a home	★	✓		
A subscription to financial advice for whatever life throws at you	★	✓		
Annual 12-point tax return review and recommendations	★			
Specialized tax planning for widowed or single women	★			
Year-round tax planning (tax-sensitive, investing, capital gain harvesting, tax loss trading, review of cost-basis, stock option exercise)	★			
Detailed review of retirement accounts and estimate of future taxation of the entire portfolio, with recommendations as to how to substantially drive down taxes on future retirement account withdrawals	★			
Review of cash flow, living expenses, and future taxes to develop a tax-efficient plan regarding the creation of tax-free accounts, and decreasing traditional retirement accounts	★			
Review of all three types of accounts (taxable, tax deferred IRA and Roth IRA) and provide the most tax-efficient method to withdraw monies, including which accounts to draw money from and amount from each account	★			
Advanced (multi-year) distribution / Roth conversion planning	★			
Estate plan review and recommendations to minimize estate taxes and honor your wishes	★			

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