



DEBRA TAYLOR, CPA/PFS, JD, CDFP

Principal and Founder



Taylor Financial Group
795 Franklin Avenue
Bldg. C, Suite 202
Franklin Lakes, NJ 07417

Tel (201) 891-1130
Fax (201) 891-1136

TaylorFinancialGroup.com

Debra Taylor, who has lived in Bergen County her whole life, is the Founder and Lead Wealth Advisor of Taylor Financial Group, LLC, a full service, woman-owned financial advising and wealth management firm located in Franklin Lakes, NJ. Debra's education and career have spanned many fields, which is why she is able to provide her clients with a multidisciplinary approach to help them pursue their goals and live life to the fullest.

Debra's passion is in educating and empowering clients and their families to take control of their future, which is why she focuses on assisting women and their families, and advises them in all areas, including investment management, insurance solutions, tax planning, retirement planning, and estate planning. Debra also specializes in providing investment and wealth management advice to high-net-worth individuals and families, and small business owners, who have unique and complex needs.

- Regularly meets with clients and maintains close client relationships to help them pursue their financial goals and take control of the future
- Maintains commitment to serve high net worth clients and business owners on comprehensive wealth management, including financial planning, retirement planning, Social Security planning, tax efficient distribution analysis, cash flow, and liability analysis
- Oversees portfolio design so as to help meet client's financial objectives and provide tax efficiency
- Oversees Estate Planning and Trust coordination to ensure that the estate plan meets client's specific goals
- Coordinates with client's other professionals (such as attorneys and accountants)