

**Cassie Conte**

**Taylor Financial Group, Inc.**

**3102 Brambleton Avenue  
Roanoke, VA 24018**

**540-774-7971**

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**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Cassie Conte that supplements the Taylor Financial Group, Inc.'s brochure. You should have received a copy of that brochure. Please contact Jay S. Arce, Vice-President, if you did not receive Taylor Financial Group, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Cassie Conte (CRD # 6550107) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### **CASSANDRA M. CONTE**

*Year of Birth:* 1992

*Formal Education After High School:*

- Radford University, BS, 5/2013

*Business Background:*

- Taylor Financial Group, Inc., Financial Planner, 1/2026 - Present
- Ashley Russo, Associate Agent, 09/2024 - 01/2026
- Northwestern Mutual, Registered Representative, 5/2024 - 1/2026
- Ashley Russo, Agent Assistant, 05/2024 - 09/2024
- Capital Family Office, Client Associate, 9/2022 - 5/2024
- Wells Fargo Advisors, Client Service Associate, 9/2015 - 9/2022

## Item 3 Disciplinary Information

Ms. Cassie Conte does not have any reportable disciplinary information.

## Item 4 Other Business Activities

Cassie Conte is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Ms. Conte for insurance related activities. This presents a conflict of interest because Ms. Conte may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Ms. Conte's receipt of additional compensation as a result of her other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Taylor Financial Group, Inc.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Jay S. Arce, Vice President and Chief Compliance Officer, supervises the advisory activities of Cassie Conte. Jay S. Arce can be reached at 540-774-7971. Jay S. Arce monitors e-mail communications and reviews client accounts on a periodic basis.

In addition, our firm has in place written supervisory procedures that are reasonably designed to detect and prevent violations of the securities laws, rules and regulations.