

**Jay Steve Arce**  
**Taylor Financial Group, Inc.**

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**February 25, 2026**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Jay Steve Arce that supplements the Taylor Financial Group, Inc. 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 Jay Steve Arce is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 Educational Background and Business Experience

### JAY STEVE ARCE

*Year of Birth:* 1983

*Formal Education After High School:*

- Florida Atlantic University, BA International Business and Trade, 2006

*Business Background for the Preceding Five Years:*

- Taylor Financial Group, Inc., Chief Compliance Officer, 01/2025 - Present
- Taylor Financial Group, Inc., Investment Adviser Representative, 10/2018 - Present
- Taylor Financial Group, Inc., Vice President, 01/2020 - Present
- Sonder Financial Advisors, President, Investment Adviser Representative, 05/2017 - 07/2018
- H&R Block, Tax Preparer, 12/2016 - 07/2018
- Uber, Driver, 08/2016 - 07/2018
- Compass Financial Group, Inc., Research Analyst, 08/2006 - 08/2016

*Certifications:*

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP® (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and

- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Item 3 Disciplinary Information**

Jay Steve Arce does not have any reportable disciplinary information.

### **Item 4 Other Business Activities**

Jay Steve Arce is not actively engaged in any other business or occupation (investment-related or otherwise) beyond his capacity as Investment Adviser Representative of Taylor Financial Group, Inc.. Moreover, Mr. Arce does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

### **Item 5 Additional Compensation**

Jay Steve Arce does not receive any additional compensation beyond that received as an Investment Adviser Representative of Taylor Financial Group, Inc..

### **Item 6 Supervision**

Jay S. Arce is our firm's Vice President and Chief Compliance Officer and is not supervised by other persons in our firm. Our firm has in place written supervisory procedures that are reasonably designed to detect and prevent violations of the securities laws, rules and regulations.