

**Marvin Taylor**  
**Taylor Financial Group, Inc.**

**3102 Brambleton Avenue  
Roanoke VA, 24018**

**540-774-7971**

**[www.taylorfg.com](http://www.taylorfg.com)**

**10/25/2016**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Marvin Taylor that supplements the Taylor Financial Group, Inc.'s brochure. You should have received a copy of that brochure. Please contact Samuel Taylor, 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 Marvin Taylor is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 Educational Background and Business Experience

### MARVIN TAYLOR

*Year of Birth:* 1943

*Formal Education after High School:*

- College for Financial Planning, Denver Colorado, Certified Financial Planner Professional Designation, 1986

*Business Background for the Preceding Five Years:*

- Taylor Financial Group, Inc., President, 07/1986 - Present
- Linsco/Private Ledger Corp, Registered Principal, 05/1993 - 08/2005

*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 63,000 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, administered in 10 hours over a two-day period, 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**

Marvin Taylor does not have any reportable disciplinary information.

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

Marvin Taylor does not have any other business activities.

### **Item 5 Additional Compensation**

Marvin Taylor does not receive any additional compensation for providing advisory services beyond the fee based compensation he receives through Taylor Financial Group, Inc.

### **Item 6 Supervision**

Samuel Taylor, Vice-President and Chief Compliance Officer, supervises the advisory activities of Marvin Taylor. Samuel Taylor can be reached at 540-774-7971. Sam Taylor 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.