

Marvin W. Taylor, CFP<sup>®</sup> -President - Marvin entered the financial services industry in 1967. He began his career by

serving in various management positions with a major financial services firm. He founded Taylor Financial Group Inc. in 1986 and became a Certified Financial Planner<sup>™</sup> in the same year. Marvin is a member of the Financial Planning Association (www.fpanet.org) and the National Association of Tax Practitioners (www.natptax.org). When away from the office, Marvin enjoys fly fishing and playing golf.

J. Samuel Taylor, CFP®, CIMA® - Vice President -Sam is a Certified Financial Planner<sup>™</sup> and a Certified Investment Management Analyst<sup>™</sup>. He graduated from Roanoke College in 1992 and joined Taylor Financial Group Inc. as a financial planner the same year. Sam is a member of the Financial Planning Association (www.fpanet.org) and the Investment Management Consultants Association (www.imca.org). In his spare time, Sam enjoys playing golf and spending time with his nephew, Alex.

Taylor Financial Group inc.

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#### **Financial Planning** For Your Future



# Financial Planning Services... Tomorrow's Concerns, Today's Solutions

Taylor Financial Group, Inc. was founded in 1986 with the goal of assisting our clients in every aspect of their financial lives. We've provided the most personal service available, thus earning a reputation for excellence in our industry. For each of our clients we strive to help create financial stability and security to provide financial independence.



### Taylor Financial Group Inc. Your Prudent Financial Guide

Our staff consists of experienced professionals with a "hands on" approach to financial guidance. Not only will you find our team members knowledgeable, but you will also discover that our staff truly cares about making your dreams a reality. As your **financial professionals**, we will do everything in our power to keep you focused on where you want to go, advise you on how to get there, and continually remind you of the importance of maintaining a disciplined approach to realizing your dreams.

# Our Way Personal Relationships, Planning For Your Future

Our company is based on the guiding principle that education and understanding of your current financial situation is vital to successfully make prudent decisions concerning your future financial condition. We take great pride in helping the people who come to us for assistance and welcome your input to reach your goals.

### Prudent Money Management Reduce Risk, Preserve Capital, Achieve Your Goals

After evaluating your goals and risk tolerance, we can create a **personalized** investment plan that is in harmony with your financial objectives. We believe that a long-term investment strategy offers the strongest potential for realizing your desired rate of return. Long-term investing minimizes risk and allows for the selection of a sound asset-allocation strategy.