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Are you SMART (Saving More After Retirement Taxes)? Are you prepared for the tax traps ahead? Do you have a retirement tax strategy? Find out how we educate and empower investors to build wealth and take control of their future.

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Effective Game Plan

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Schedule a Complimentary Phone Consultation

Our financial planning services are built on trust, transparency and accountability.

Our experienced team of professionals will develop a personalized plan that gives you the power – and a path – to realize your dreams. Explore services

Discover the right investment strategy for you.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?

0-2%

2-4%

4-6%

6-8%

More than 8%

Next

How to get started.

1. Schedule an appointment

2. Meet with us for a custom listening session

3. Get your personalized strategy

Schedule an appointment

See What Makes Us Different

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Please provide your name and email and we will have an a

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Last Name*

Email*

Phone Number*

Submit

You deserve to understand what's happening with your money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking about your money, your life, your family and your future.

At Taylor Financial Group, we believe you should understand everything that is happening with your money, and that we should be just as good about explaining investments as we are at making them. More important, you deserve someone who understands you (and your family) and who will take the time to care. Life is too short to worry about whether your financial advisor cares about you and your family or whether she has your back.

+ What are you going to do with my money?

+ Can you handle the complexity of my situation?

+ Ho

About Taylor Financial Group

Taylor Financial Group, LLC (TFG) is an independent wealth management firm located in Franklin Lakes, NJ (Bergen County), founded by Debra Taylor, that specializes in and can act in a fiduciary capacity to high net worth families, independent women and small business owners. We have more than twenty years of experience in financial advising and wealth management and use our diverse tax and legal background to provide unbiased, comprehensive, and custom financial solutions to all of our clients with the help of WealthMatch, our personal financial management experience.

We love what we do and are deeply committed to every single client. Because we serve less than 100 families, every client has a personal relationship with our team and they are all special to us.

Mission Statement: *To guide our clients on their journey towards well-being and a prosperous life.*

Investment Management

Disciplined investment strategies are the foundation of our investment management process. Our time-tested strategies are designed to meet a variety of investment goals and objectives.

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Carson Group Partners

Carson Group Partners is a network of growth-minded advisors with one common massive transformative purpose: to be the most trusted for financial advice.

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Our Location

Located in Franklin Lakes, NJ, Taylor Financial Group, LLC is committed to helping our clients take charge of their financial future. Contact us today to speak with a financial advisor or financial professional nearest you.

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Mistakes
People Make
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Accumulating
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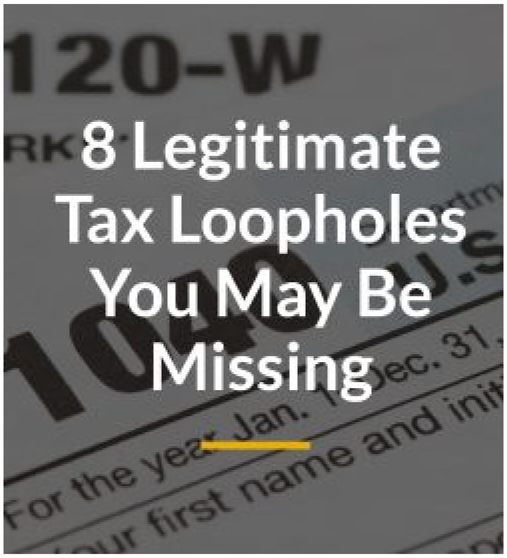
Million



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Insights

Taylor Financial Group's team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need. Read more

Blog

THE WEEK AHEAD: THE NEW ABNORMAL

Dr. David Kelly believes it is abnormal that we are in the 10th year of expansion (and looking like we will make it to an 11th year). The US traditionally is a free enterprise-focused economy and in favor of global trade, but now we are shifting towards getting tougher on trade, and beginning to extensively use tariffs. Like many, Kelly thinks that this is a very aggressive trade policy and could be damaging to the World order.

Read more

THE NEW ABNORMAL

Written by Taylor Financial Group

Dr. David Kelly, Chief Global Strategist of J.P. Morgan Asset Management, recently shared his economic outlook with us after the Federal Reserve's meeting on June 19th, 2019.

Read more

WEE COMMI

The S&P 500 slipped slightly last week after reaching a new high the previous week. The S&P 500 declined 0.3%. The MSCI ACWI inched 0.1% higher, and the Bloomberg BarCap Aggregate Bond Index rose another 0.4%. Yields continue to fall as expectations of an interest-rate cut mount.

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