Client Bill of Rights

A great relationship is based upon a solid foundation. The Client Bill of Rights clearly identifies the level of proactive service and relationship you will experience at Taylor Financial Group.

Quality of Service

You are entitled to a high level of proactive, courteous service from all associates at Taylor Financial Group.

Trusted Advisors

You have the right to work with a trustworthy, dependable, independent Wealth Advisor focused on your journey to True Wealth. Your Wealth Advisor will develop a personal relationship with you through insightful communication highlighting our core beliefs, investment outlook and management philosophy. Your Wealth Advisor will present portfolio reviews annually or as often as necessary, and be available to answer the questions that matter to you as they arise.

Recommendations Based Upon Your Needs

You have the right to independent and unconflicted advice and recommendations based upon your defined needs, risk tolerances and goals. Through holistic Wealth Planning, your needs are clearly defined and constantly monitored.

Confidentiality

You have the right to the strictest levels of confidentiality with information provided to your Taylor Financial Group team. We will protect all information to the highest standards outlined by SEC, state and regulatory agencies.

Accuracy

You have the right to accurate third party reporting of all managed accounts. Your statements will identify all account positions held, cash receipts and disbursements made through Taylor Financial Group.

Transparency

You have the right to a transparent relationship and to clearly know the costs for portfolio management, transactions and advisory services. All communications with the Taylor Financial Group team strive to be clear and concise. If you have a question, it is our duty to answer it for you in an understandable way.

Prompt Response

You have the right to a prompt response from your Taylor Financial Group team. As your trusted advisor, we commit to returning calls by the end of each business day. Should you require additional research, our team will set a clearly defined time frame for redress.

Timely Communication

You have the right to be communicated to in a timely manner. As your trusted advisor, our goal is to provide you with information before the question arises, regardless of the medium used.

Education

You have the right to continual education along your journey to True Wealth. Through education, our team will project reasonable expectations and achievable scenarios in the development and constant monitoring of your Wealth Plan.

Best Execution

You have the right to receive best execution in all that we do. Portfolio transactions will be executed in a timely manner, at the best available price, and with prompt third party confirmation. All interactions with the operations team will be timely, precise and promptly completed.

Wealth Designed. Life Defined.™

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