TAYLOR FINANCIAL GROUP, LLC
THE RIGHT PARTNER CAN MAKE ALL THE DIFFERENCE

TAX SEASON IS OVER!

But our work is never done.

Most of you have filed your 2019 taxes and said "goodbye and good riddance" to tax season. You probably won't be thinking about taxes again until next year. And that's fine... you deserve a break from the stress of tax season.

We, on the other hand, work all year around to make sure that all aspects of your financial plan and investments are functioning in the most tax-advantaged ways possible. Particularly with the new tax laws, we want to be extra prudent in reviewing your portfolios and plans.

To that end, if you haven't already sent us copies of your 2019 tax returns, please do so as soon as possible. Reviewing your 2019 returns will make it easier for us to determine what tax strategies are best for you for the remainder of 2020.

We want to do everything we can to make sure you avoid any unnecessary penalties or fees. But we can't do that without having copies of your 2017 tax returns.

Help us help you!

Ways You Can Send Us Copies of Your 2019 Tax Returns

-Send them via regular mail - we can send you a postage-paid envelope.

-Drop them off at our office - we'd love to see you, and we'll copy them for you.

-Securely upload them to your WealthMatch vault - call us to learn how.

-Fax them to us - we still have one of these machines. :-)

If you have any questions or need assistance, don't hesitate to email or call us.

Taylor Financial Group
795 Franklin Avenue
Building C, Suite 202
Franklin Lakes, NJ 07417
T. 201-891-1130
F. 201-891-1136
office@taylorfinancialgroup.com
www.taylorfinancialgroup.com

Stay Connected

For a comprehensive review of your personal situation, always consult with a tax or legal advisor. Neither Cetera Advisor Networks LLC nor any of its representatives may give legal or tax advice. CWM, LLC does not provide tax or legal advice.