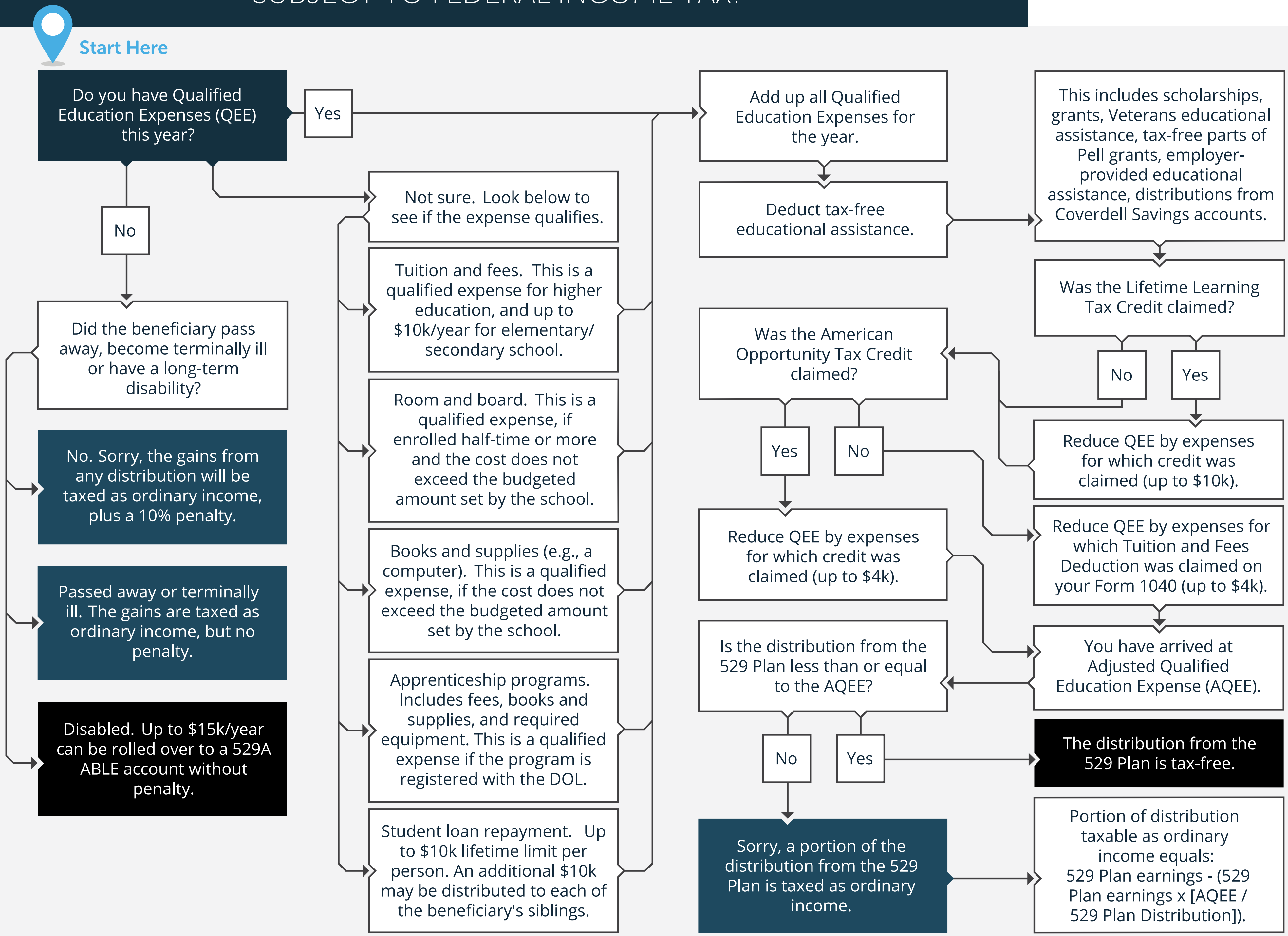
2021 · IS THE DISTRIBUTION FROM MY 529 PLAN SUBJECT TO FEDERAL INCOME TAX?

TAYLOR FINANCIAL GROUP, LLC



EXECUTIVE SUMMARY: WHY US?

Our personal touch and commitment to our clients change lives. We consider financial planning a “calling” and so we dedicate ourselves to each and every client in a way that is unusual in today’s fast-paced world.We have an experienced team serving a limited number of families so that we can provide a great client experience and the attention you deserve.

We are an award-winning firm affiliated with Carson Wealth Partners, a recognized national firm, but we have a local presence in your backyard, as well.

Our tax and legal background allows us to handle whatever you throw our way, no matter how big or small, how simple or complex. We will figure it out and get the job done!

DEBRA TAYLOR, Founder and Lead Wealth Advisor
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