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## THANK YOU FOR 20 YEARS

Take a Ride with Us Down Memory Lane

### We Built **Strong Relationships**



Over the last **20** years, we have built strong and lasting relationships with our clients. **In fact, 25% of our clients have been part of our TFG family since 1998!** **21** of these clients are women. We are so blessed to have each and every one of our **81** clients. We couldn't be happier!

### We **Celebrated** Annual Milestones

We celebrated over **1,500** client birthdays, over **200** wedding anniversaries, and

over **1,000** client anniversaries with our firm.



## We Went **All In On Women**



In early **2017**, we decided to focus on our passion - helping women take control of their future! So we revamped our website and added an entire section dedicated to **Women & Investing**. We've also created tools and resources specific to educating and empowering women, like our *blogs for women*. We also hosted events for our female clients, like our popular Ladies Luncheons and Galentine's

Dinner! And, as a result of your feedback, we are in the process of sponsoring two Girls Who Code clubs!

## We Created Our **Financial Empowerment Workshops**

On **January 7, 2017**, we held our very **first** financial empowerment workshop. The workshops started as an initiative to help educate and empower women, but the response was so great that we extended the series to offer workshops to all. We now cover **9** different topics from investment management to estate planning to tax reform. Our attendance skyrocketed with our highest attendance reaching **43** people at a single workshop.



**Since then, we have held more than 55 workshops! Stay tuned for more initiatives in this area, such as online courses and a monthly series.**

## Staying **In Touch** and **on Track**

We have held over **1,500** meetings with our clients throughout the last **20** years. We have sent out more than **650** weekly newsletters.



## We Helped Our Clients Through **Life Transitions**

We have advised **99.9%** of our clients on buying their homes and planning for their retirements. We have discussed family wealth transfers with **99%** of our clients.



## We Offer **More Services** to Clients

While we started with basic investment management, we have grown immensely and now offer over **60 different financial planning services** to cover all of your financial needs! Below are some of our most critical financial planning services, but all of our services are not listed because they do not fit onto this page!



## **Our Personal Service Goals - To Infinity & Beyond!**

1. Supply additional planning and more comprehensive services to our clients
2. Provide clients with additional tax and investment guidance based on the new Tax Act

3. Utilize distribution planning for large retirement accounts so that clients can keep more of their money and pay less to the government
4. And many more....



## We Exceeded **Our Philanthropy and Volunteer Goals**



Throughout TFG's lifetime, we have donated over **\$750,000** to charitable organizations, and collected **hundreds** of toys for Toys for Tots. The TFG Team has accumulated more than **5,000** volunteer hours over the last **20** years.

## Debbie Received Recognition as an **Industry Leader**

Debbie Taylor, Wealth Manager, has been honored with more than **22** awards (too many to count in fact) over her last **20** years as a financial planner. Debbie also has spoken at more than **50** conferences where she presented to her peers about industry best practices and how to improve the client experience. In fact, Debbie has written more than **200** articles advising her peers on industry best practices. Due to the popularity of those articles, Debbie then wrote an entire book on what she has learned throughout her journey in the financial planning industry and now teaches 2-day workshops to her peers.



## We **Celebrated Additions** to the Taylor Financial Group Team

- Lucky joined our team as a professional Furniture Analyst.
- Coco was hired as the official Director of Enjoyment.
- Audra took her rightful place as the Office Oracle.
- Oliver stepped right up as the Quality Control Specialist.



We couldn't do it without them to cheer us on!

**\*Disclaimer\***

20 years is a long time! Therefore, we have estimated the numbers above to the best of our ability. :)



We are so thankful to all of you, our clients and friends, for this amazing journey we have been on for the last 20 years. We have all learned so much, and have truly enjoyed supporting and helping you through all of life's ups and downs. Stay tuned for additional activities and celebrations!

**It has been an incredible two decades, and we cannot wait to do it all over again!**



# THANK YOU FOR A GREAT 20 YEARS! HERE IS TO AN EVEN GREATER FUTURE!

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