Procrastination stops now

OWN YOUR FINANCIAL FUTURE
BUSINESS IS BUSY

You can easily relate. Owning and operating a business means full days and a hundred different fires to put out, let alone time and space to make strategic decisions within the company for its future. “Busy” probably isn’t a strong enough word to describe your day.

You know how money works. You have to know. For now, you make plenty of it. But what happens after you cash that last paycheck?

YOU MAY BE WONDERING...

“What does a financial advisor know that I don’t?”

“Is there something I’m missing that could really help me today?”

“Will my lifestyle have to change in retirement?”

“Would an advisor even understand how unique my financial picture is?”
The top reasons our clients don’t have a plan:

- You don’t have time.
- You make good money right now.
- You believe your finances are too complex.

Great! Let’s get to work…

We have the time and systems to make planning easy on your clock.

Let’s make sure you make good money now AND later.

Complicated doesn’t scare us, especially since we know your industry.
THE INDUSTRIES WE KNOW (AND LOVE)

CONSTRUCTION INDUSTRY
You are about moving through projects as fast as you can. Construction is a cyclical business and we know that cash flow changes a lot from year to year. We work to tame the chaos.

BUSINESS OWNERS
Your time is precious and if you’re like most business owners, you have your finger in a million different tasks. Your finances may be healthy, but disorganized. We help to bring order, organization and simplicity to your money.

FORMER MILITARY / DEFENSE CONTRACTOR INDUSTRY
Military benefits are complicated. There are few people who have a comprehensive understanding of them and even fewer that know how to optimize them. Your job isn’t to become an expert in TSPs, SBPs, VGLI, veteran-owned tax benefits, and investment strategies. That’s on us.

APPROACHING RETIREMENT
The transition from work-life to retirement has the opportunity to be a smooth transition, but a knowing guide is absolutely necessary. Together we can maximize how your benefits pay out.
OUR PLANNING PROCESS

Listen.
Taylor Financial starts “ears first”. We know our industries, so no one wastes any time translating jargon or acronyms.

We ask intelligent, specific questions to get to know you, your business, and your vision for the future.

Define.
What are your dreams and goals? Together, we outline the “Want to” and “Have to” lists.

Let’s get a clear picture of where your finances are today, then tame the chaos by building a bridge to organization and simplicity.

Implement.
When the plan is done, it’s time to get moving. Concierge styled service means we do it all for you, to be efficient with your time.

Taylor Financial takes the wheel on all the complexity, so you can stay focused.
6 STEPS TO A FINANCIAL PLAN

STEP 1: Discovery Interview
STEP 2: Data Gathering
STEP 3: Plan Development
STEP 4: Plan Collaboration
STEP 5: Plan Implementation
STEP 6: Proactive Review

Clients are free to implement the plan recommendations with the financial professional of their choice. Periodic reviews or updates require a new agreement and may be subject to additional fees.
BROKER. AGENT.

TRUSTED ADVISOR.

Working with our team isn’t just about money management. For us it’s a chance to serve people who are mostly serving others. It’s our duty to learn as much as we can and to keep improving our expertise, consistently staying out ahead of our industries. Our mission is to bring expertise and concierge level service into your financial life. Someone who can see the big picture with you, and then follow up to bring it all into reality.

Abandon “Chaos”.

Together, we can create a financial plan that is strategically organized and systematically designed to enhance your life.
OUR SERVICES

We act as a bridge by taking our clients from point A to point B over a series of barriers. It takes a lot of components to build a secure bridge, which is why we have so many experts on the team. Once across, there’s no more chaos. Our clients experience the deep breath of knowing their finances are simplified, organized and secured for the next steps in life or work.

INSURANCE PLANNING
Life, Disability Income, Long Term Care Insurance.

INVESTMENT PLANNING
Stocks, Bonds, Mutual Funds, Education Plans, Annuities.

DISTRIBUTION PLANNING
Brokerage, Advisory, Retirement, Non-Retirement.
Our collaboration with eMoney, allows you to check in on your financial picture instantly, from anywhere.
OUR TEAM
* Alliances are not exclusive relationships. You are free to choose your own professional for these needs.
LET’S CONNECT

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