For the clearest path to your goals, consider the data

"Successful and strong women – I am married to one, I was raised by one, and in my practice I am fortunate to serve them. My mission is to help women pursue their financial goals while factoring in important data points. Take for example the fact that women on average have longer lifespans, according to the U.S. Census Bureau. That can mean stretching your money over more years, with the potential for higher lifetime healthcare costs. As part of your personalized financial plan, the team at Tailored Financial Strategies takes all of this into account. We're dedicated to serving women. That's because we know that to you, it's more than money. It's empowerment."

Kennie

KENNIE A. TAYLOR, CIMA®, CDFA®, CLTC
Certified Investment Management Analyst℠
Certified Divorce Financial Analyst®
Certified in Long-Term Care
Vice President, Investments

We offer a diverse set of services

Retirement Income Planning
Investment Management
Special Needs
Long-Term Care Costs
Charitable Giving Strategies
Financial Planning
Risk Management
Estate Planning
Trust Services
Tax Planning
Business Succession Planning
Wealth Transfer Strategies
Multigenerational Planning

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Empowered Women: Planning for the life you envision

TAILORED FINANCIAL STRATEGIES | ALEX. BROWN A DIVISION OF RAYMOND JAMES

Helping you navigate *each stage and phase*

We put our decades of experience to work for you, helping you with the major decisions in life as well as the small details. We build strong connections with clients in this way. From saving for retirement to legacy planning, we strive to be by your side for each big milestone in life.

Whether you've been comfortable making financial decisions for some time, or you've been forced to transition into that role alone after a death or divorce, we are here to assist you in every aspect of your financial journey.

Gathering all the details in a comprehensive plan

Your goals and dreams deserve a holistic financial plan – one that encompasses all that brings meaning and purpose to your life. That's why we go beyond investments to include all essential financial matters. Using sound investment theory, we take a team approach to building what we believe is the best strategy for you.

Taking a long-term perspective

With lifespans and retirements stretching over more years, longevity is a crucial factor to consider. Our clients enjoy access to a wealth of resources to help them live long, fulfilling lives. From sophisticated financial planning tools to customized planning, we offer thoughtful support.

Bringing clarity and confidence

We know that many of our clients are impacted by life-changing transitions, and face the uncertainty of the future and fear its unpredictable nature. We help our clients gain clarity by creating a tailored life, health and financial plan to provide confidence in their family's future.

CASE STUDY

Balancing today's needs and tomorrow's goals

The primary breadwinner for her loving family, Claire has a solid career and a lot of financial complexities that must be untangled. Most of her savings are tied to her children's upcoming educations and her own retirement. She is balancing providing for her family with caring for her adult parents. While money can often be tight, time may be the rarest and most precious commodity.

Our approach:
First, we would identify Claire's needs and prioritize her goals, creating a road map that shows the big picture. The next step is to develop a thorough plan that addresses all the details, such as education savings accounts and benefits planning. We would also look at her parents' financial situation and determine how assets can be applied to caring for them. Our focus would then shift to giving Claire the tools to track spending in order to find ways to reduce debt and contribute more to her retirement plan, helping her keep her long-term goals on track. We want to help her feel more confident about having the money she'll need to maintain her lifestyle.

This investment profile is hypothetical and not indicative of any specific situations or clients. It is presented only as an example and not intended as investment advice.

Providing personal and responsive service

Making a difference in the lives of our clients is what drives us. That's why we pride ourselves on providing responsive service tailored to the needs of each client. For financial matters large and small, our clients know they can turn to us for advice.

Contact us and get insight tailored to your life.

A dedicated and focused client experience awaits.
Call us at 857.504.7842 (Boston) I 727.567.2927 (St. Petersburg) to learn more.