We offer a diverse set of services

Retirement Income Planning

Investment Management

Special Needs

Long-Term Care Costs

Charitable Giving Strategies

TAILORED
FINANCIAL STRATEGIES

ALEX. BROWN
A DIVISION OF RAYMOND JAMES

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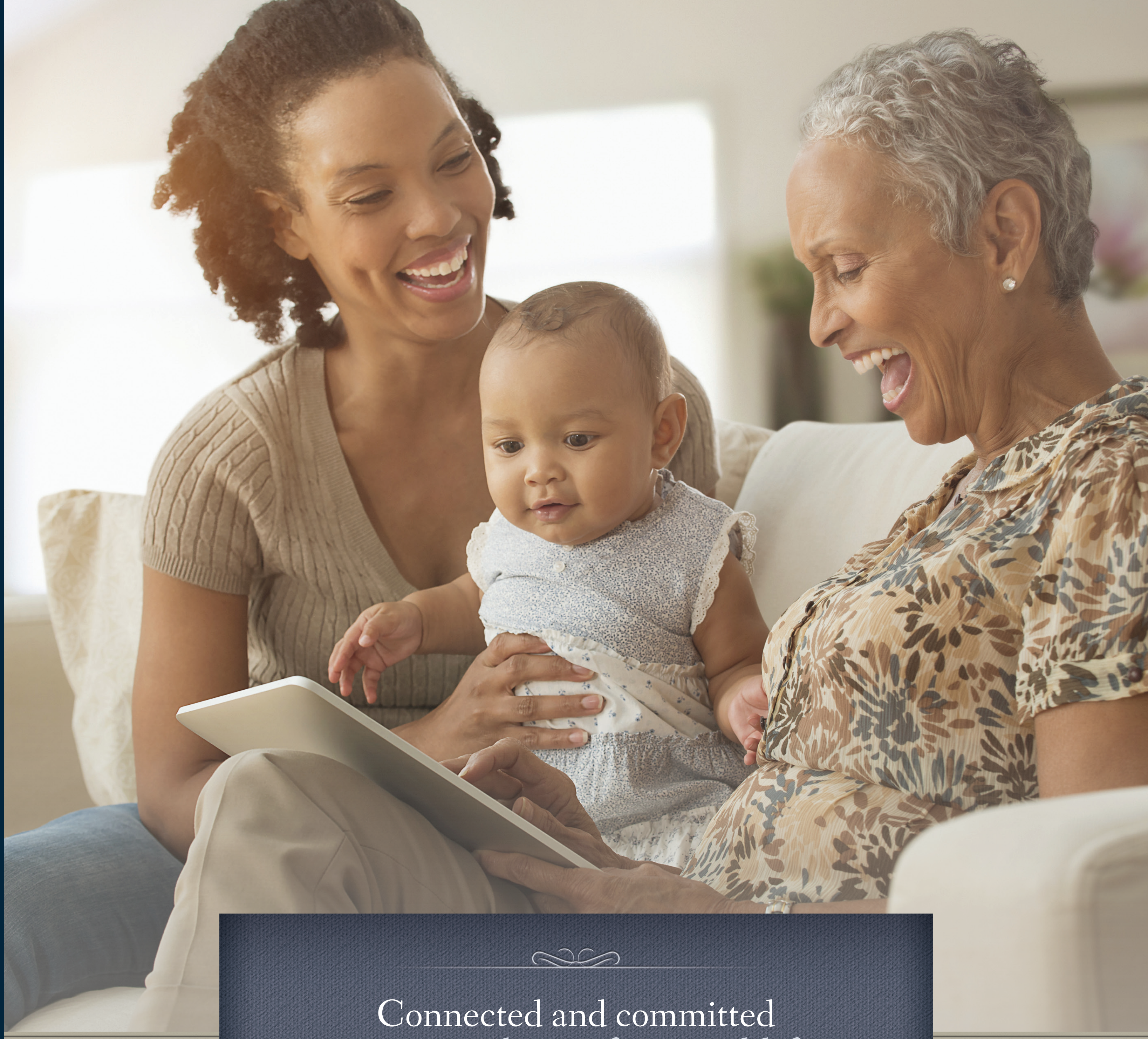

Connected and committed
to you and your financial life

TAILORED
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A personal welcome
from Kennie Taylor

At Tailored Financial Strategies, being connected and committed to you isn't just some catchphrase – it's our calling and reason for being. The personal experiences of my life are natural bridges to the strong connections I have with our clients.

My mom and sisters, all strong women, manage the money in their households. Also, growing up as the middle child between two sisters helps in how well I relate to women. Experiencing how a difficult traditionally litigated divorce negatively affected my younger sister and our entire family, my thought was there must be a better way, especially when children are involved. I truly see the value in a cooperative and collaborative process that removes the courtroom entirely.

My father was a physician and my godfather a dentist, so it helps me understand the mindset of the doctors we serve. I was a dentist before a car accident prevented me from practicing, so I intimately understand the financial concerns of healthcare professionals.

Our team has great empathy for the individuals and families we serve – and finds great fulfillment in being able to make a difference in their lives.

Kennie A. Taylor, CIMA®
Vice President, Investments

Services

- Financial planning
- Investment management
- Asset allocation
- Estate planning
- Trust services
- Retirement planning
- Risk management
- Tax planning
- Insurance planning
- Business succession planning
- Multigenerational planning
- Wealth transfer
- Charitable giving strategies

Insightful financial guidance *personally tailored to your life*

Our mission is to understand what's really important to you and help you live the life you envision for yourself and your family. How do you define success? What do you want to happen – or not happen?

We are committed to personally advising you, rather than just merely providing you with information. In creating your comprehensive financial plan, we not only address your investments, but your entire financial life. We make sure you have a sound strategy in place to touch every aspect of managing and preserving your wealth and building a legacy.

All of our team members take part in our planning process and investment approach, sharing knowledge and leveraging strengths to arrive at the best possible strategy, advice and guidance we can bring to you. As with all of our clients, you are like family to us. We enjoy getting to know you, learning about your goals and personalizing a financial plan designed to achieve these objectives.

It's not just our life experience that enables us to serve you, but also our financial industry knowledge and wisdom. You will find a highly capable advisory team with decades of experience and credentials such as Certified Financial Planner™ practitioner and Certified Investment Management Analyst℠. We didn't amass this experience or these credentials for our own sake – but for yours.

We'll work with your tax and legal professional to not only look at the big picture, but address every detail – a holistic approach coordinated by one cohesive team that includes everything from retirement planning to risk management.

By having an office inside the international headquarters of Raymond James, one of the largest independent financial services firms in America, we have access to more than 3,500 industry professionals in a wide range of disciplines – to help us bring a wealth of financial knowledge personally to you.

Specialized knowledge in *serving successful individuals*

Our clients represent a wide range of ages, occupations, incomes, ethnicities – and hometowns. Yet they each seek the experienced financial guidance of Tailored Financial Strategies; geographic distance is neither an issue nor an obstacle. Among the varied clients we serve, there are five niches where we apply specialized knowledge and experience.

EMPOWERED WOMEN

Women make up half of the American workforce and are the primary wage earners in more than a third of homes. We are proud to help advise them as they take greater control of their finances. Women often pause their careers to care for young children or aging parents – which creates a powerful need for thoughtful planning and financial decision-making. We are here to assist you in every aspect of your financial journey as you build the life you want.

HEALTHCARE PROFESSIONALS

As a healthcare professional, you spare no amount of care in helping patients – and you seek an advisor who will craft your financial treatment plan with the same thoughtfulness in collaboration with you and your family. We have deep experience not just working with healthcare professionals, but quite literally walking in their shoes. As a former dentist, client advisor Kennie Taylor has a profound understanding of the risks inherent in the industry and the need for tax-aware investing. Many physicians have faced reimbursement cutbacks, increased patient loads and restrictive administration mandates – while trying to provide high-level care. It's clear there's an urgent need for thorough, personalized financial and retirement planning to help grow and preserve wealth.

DIVORCEES

Divorce often takes not just an emotional toll, but a disproportionate toll on women's finances as well. We've witnessed courtroom battles and believe there is a better way to dissolve a marriage, especially when children are involved. A cooperative and collaborative process can better protect your financial outcome while maintaining maximum privacy for you and your family. We work with your legal and accounting professionals to help you carve a path toward a more secure financial future.

SPECIAL NEEDS

Caring for a loved one with special needs requires intricate work to safeguard their quality of life without interfering with eligibility for vital government benefits. Options include a special needs trust designed to supplement public benefits, for things such as education, recreation and equipment needed for mobility. We can also assist with selecting tax-advantaged strategies designed to help individuals with disabilities and their families save for future needs. Both of our principal team members have firsthand knowledge of the need for careful, coordinated planning to navigate this challenging terrain, ensuring your loved one will be cared for – no matter what.

RETIREES

With retirees living longer, more active lives, a retirement plan must help you live the life you've long envisioned while mitigating risk that could jeopardize your nest egg. We offer a full range of resources to help pre-retirees and retirees nurture wealth, so they'll feel confident in their financial future. If you have to make trade-offs, we can show you how small compromises might make a big impact over the long term. We talk openly about the things that concern you and the strategies that may help. And as life changes, we update your financial, estate and legacy plans to keep your wealth working for you, your favorite causes and future generations.

The highly capable and caring *financial partner you deserve*

You deserve a dedicated financial team that will look out for your best interest, and devote an extraordinary degree of industry knowledge and expertise to managing and preserving your wealth. At Tailored Financial Strategies, we will carefully address each detail in a manner that not only fits your situation, but your life – so you are free to focus on what matters most to you and your family. Let's have a meaningful conversation about what can truly make a difference in your life.