Debra Taylor was named a Five Star award winner for 2022 in November 2021. By earning this honor, Debra has shown an outstanding commitment to clients.

As such, it is an honor to announce that Debra Taylor, CPA/PFS, JD, CDFA, Wealth Manager has earned the 2022 Five Star Wealth Manager Award, demonstrating a strong commitment to providing exemplary services to all her clients.

The Five Star Wealth Manager award is based on objective research criteria. Five Star Professional's research team evaluates candidates from across major markets annually on ten criteria associated with outstanding service. Each of our award winners has shown a commitment to clients, strong industry credentials and has been evaluated on the quality of his or her practice. Debra Taylor has met these criteria and has been honored with the 2021 Five Star Wealth Manager award.

ABOUT TAYLOR FINANCIAL GROUP, LLC

Taylor Financial Group, LLC (TFG) is an independent wealth management firm located in Franklin Lakes, NJ that specializes in serving affluent women and their families, high net worth families, and small business owners. We have more than twenty years of experience in wealth management and use our diverse tax and legal background to provide objective, comprehensive, and unique financial solutions to all of our clients.
https://www.taylorfinancialgroup.com/

ABOUT FIVE STAR WEALTH MANAGER AWARD

The Five Star Wealth Manager award awarded to Debra Taylor: 2015, 2016, 2017, 2020, 2021, 2022 administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Actively registered as a registered investment adviser or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by Five Star Professional, the wealth manager has not: A. Been subject to a regulatory action that resulted in registration being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or Five Star Professional's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually *contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth managers. Award does not evaluate quality of services provided to clients. Working with a Five Star Wealth Manager does not ensure that a client or prospective client will experience a higher level of performance or results. The inclusion of a wealth manager on the Five Star Wealth Manager Award list should not be construed as an endorsement of the wealth manager by any client nor are they representative of any one client's evaluation. The Five Star award is not indicative of the wealth manager's future performance. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Five Star Professional in the future. For more information on the Five Star award and the research/selection methodology, go to fivestarprofessional.com. Listing in this publication and/or award is not a guarantee of future investment success. This recognition should not be construed as an endorsement of the advisor by any client.*

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