Debra Taylor, Founder, Wealth Advisor, and Lead Tax Planner:
Professional Wealth Advisor and Tax Planning Specialist

INDUSTRY SPEAKER PROFILE

About Debra… Debra Taylor, CPA/PFS™, JD, CDFA®, is a distinguished wealth advisor and tax planner, as well as the Founder of Taylor Financial Group, LLC. Located in Franklin Lakes, NJ, this full-service, woman-owned wealth management firm is dedicated to empowering clients to persue their financial futures. With a background as a CPA and a retired attorney, Debra specializes in retirement planning, complex tax strategies, and legacy planning. Over her illustrious 25-year career, she has garnered numerous accolades and is renowned as an industry thought leader.

More Information… Debra's experience is widely recognized through her extensive contributions to the field. She has authored hundreds of articles and a book on industry best practices. As a sought-after speaker, she lectures for esteemed organizations such as the AICPA, Thrivent Financial, Horsesmouth, and Holistiplan. Her insights are frequently quoted in national publications including Barron's, The Wall Street Journal, and various trade journals. Debra's specialty lies in advanced tax planning for clients approaching retirement, managing substantial retirement accounts, or navigating the complexities of legacy planning.

Speaking Engagements and Advocacy for Women In addition to her work with industry groups, Debra is passionate about empowering women through financial education. She frequently speaks at women's groups, sharing her knowledge in tax planning and wealth management to help women take control of their financial destinies. Debra is dedicated to breaking down complex tax concepts into understandable strategies, enabling women to make informed decisions about their finances. Her commitment to women's financial literacy has made her a sought-after speaker at various women-focused events, where she inspires and educates attendees on workingh toward financial independence and success.

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