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Sophistication at Every Level

FROM LEFT TO RIGHT: Tripp Duerson, Partner; Craig Huff, Investment Associate; Kari Baldys, Director of Investment Operations; Gary Taylor, Founder and CEO; Michael Joyce, Partner; Courtney Wideman, Client Service Associate; and Nick Wright, Associate Financial Advisor.

Through exceptional planning and service, Taylor Financial removes the stress of wealth management.

Details matter at Charlottesville's Taylor Financial, where vetted wealth advisors help clients live impactful lives through the power of intentional planning.

Backed by nearly 40 years of experience and Northwestern Mutual, one of the biggest names in financial planning, the acclaimed firm manages clients' wealth with careful precision.

"From building a house to building a life, having a comprehensive, detailed plan always leads to better results," says Gary Taylor, CFP®, CLU®, ChFC®, AEP®, founder and CEO. "That's even more imperative when striving to secure your financial future."

A Charlottesville native, Taylor provides personalized wealth management while also serving as managing director for Northwestern Mutual's Charlottesville and Lynchburg offices. He's recognized as a *Forbes* Top 100 Financial Security Professional and Best-In-State Wealth Advisor but credits his colleagues for supporting his success.

"We've built an exceptional team that represents the needs of one of the wealthiest communities in the United States," Taylor says. "Our clients demand sophistication at every level."

For the Long Term

At Taylor Financial, sophistication translates to high-touch service delivered by a multigenerational team of advisors. Designed with longevity in mind, the firm is committed to providing trusted guidance and support for generations.

"When we meet prospective clients, we go beyond the numbers to reach the heart of their hopes and dreams," says Tripp Duerson, CFP®, RICP®, CLTC®, partner, lead advisor, and head of Taylor Financial's Lynchburg office. "We get to know them personally and understand what's really important to align their wealth accordingly. As the relationship progresses, our clients depend on us to guide their adult children and future generations down the road. That level of trust is humbling."

"We are intentionally a multigenerational firm," adds Michael Joyce, CFP®, RICP®, ChFC®, CLU®, ChSNC®. The youngest of the firm's three partners, he personalizes tax-efficient retirement and wealth management strategies with flexibility in mind. "Even our best plans change. But as years pass, we remain a close partner and keep clients on track by adjusting plans as needed."

That's one way Taylor Financial removes the stress of wealth management while helping clients live life to the fullest. "We embrace the complicated, and there's no situation too complex for our team to figure out," says Nick Wright, associate financial advisor. He joined the firm after graduating from Virginia Tech in 2020 and guides clients by putting himself in their shoes—whether they're buying their first home or enjoying hard-earned retirement.

From estate and wealth planning to risk management, employee benefit plans, and more, Taylor Financial helps clients navigate all facets of financial planning. The firm is one of the area's largest wealth management groups and leverages its prowess by supporting the Paramount Theater, the Virginia Institute of Autism, the University of Virginia Cancer Center, and other community nonprofits.

"Our goal is to be part of the fabric of this community," says Taylor. "The more generosity, kindness, and compassion are shared, the better our world will be."

TAYLOR FINANCIAL

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