



NEWS RELEASE

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FOR IMMEDIATE RELEASE

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Taylor Wealth Management Group Honored as Menifee's May Business Spotlight

MENIFEE, CA—The City of Menifee is thrilled to announce Taylor Wealth Management Group (TWMG) as the recipient of the City's May 2021 *Business Spotlight*. The *Business Spotlight* program is part of the City's Economic Development Department's B3 (Building Better Businesses) program. It works to showcase local businesses that go above and beyond the call of business, foster pride in Menifee's thriving business community, and promote diversity in Menifee's local economy.

Advisors Jeremy Taylor, CRPC® and Ivette Taylor CFP®, CRPC® are a husband-and-wife financial planning and asset management team who own and operate Taylor Wealth Management Group. They brought their practice to Menifee in 2009 after starting their careers in 2004 and 2005, respectively. Together, they manage over \$150 million and service more than 140 financial planning clients.

Taylor Wealth Management Group was nominated as a business spotlight for their tremendous work in the community. They recently partnered with the Menifee Union School District to create Project Best Foot Forward, which helps provide new shoes to students in need. They have also supported local affiliates of Together We Rise, a national organization helping transform the way kids experience foster care. Ivette has been an active member of the Lake Menifee Women's Club since 2007 and hosted trainings in partnership with the City of Menifee and the Menifee Valley Chamber of Commerce to share her knowledge about finances to assist other business owners.

Providing excellent client service is made possible through the tremendous support given by TWMG team members Kamala Davis and Kristine Evangelista. For the past 12 years, Ms. Davis has served as Client Service Manager and Operations Specialist. Ms. Evangelista, who joined the team 2 years ago, serves as Financial Planning Assistant.

Taylor Wealth Management Group delivers personalized financial advice to help clients achieve their current and future financial goals. One of the main areas of focus for TWMG is helping clients prepare for and transition into retirement and help manage clients' assets through the ups and downs of the market. By identifying clear steps, the Taylors help take the uncertainty out of planning for a client's financial future. They work with



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clients to make them feel more confident, connected, and in control of their financial life.

TWMG offers a wide range of financial services, including:

- Retirement Planning Strategies
- Investments
- Retirement Plan Distribution
- Wealth Transfer and Inheritance
- Tax Planning Strategies
- Estate Planning Strategies
- Small Business
- Insurance

The City of Menifee invites you to view the Taylor Wealth Management Group's business spotlight video. The video can be viewed on the City's YouTube page: <https://youtu.be/uhh2a1IUWaA>.

The *Business Spotlight* is a free business recognition program that brings awareness to local businesses and their contributions to the Menifee Community. Chosen applicants are nominated by the community, honored during a special presentation at a Menifee City Council Meeting, and receive a free 30-second professional video developed by the Department of Economic Development. The video is then showcased on the City's business website, www.menifeebusiness.com.

Nominations should recognize businesses in Menifee that contribute to the betterment of the Menifee community. Please visit the link below to apply:

<https://www.cityofmenifee.us/499/Menifee-Business-Spotlight-Program>.

For more information on the *Business Spotlight* program or other resources available to Menifee businesses, please contact the Economic Development Department at econdev@cityofmenifee.us.

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ABOUT MENIFEE: *Situated in the heart of southern Riverside County along Interstate 215, Menifee is a vibrant, new city of more than 100,000 residents who enjoy a pleasant year-round climate, abundant recreational offerings, reasonably priced housing and convenient proximity to some of Southern California's premiere attractions and employment centers. Within its 50 square miles, Menifee's business, retail and entertainment outlets are starting to shape the community's character and this growing economic base is also contributing favorably to the city's strong financial position. Menifee's growing family-oriented population values the city's ongoing commitment to public safety, community events and smart growth for the future. All of these elements are working together to support the city's strategic vision to make Menifee one of the state's most promising new cities.*