Debra Taylor

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Changing the Way People Think About Taxes

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Award-winning insights on tax planning and practice management — *customized for your audience.*



Debra Taylor brings decades of industry expereince to the stage with an approachable, entertaining style. She is a recognized veteran in the tax and financial services space, known for delivering technical content with humility and humor. She is a sought after industry speaker and her insights are regularly featured in *Barron's*, *The Wall Street Journal*, and leading trade publications. Debra specializes in tax planning for clients approaching or in retirement, distribution strategies, legacy planning, and serving the unique needs of women investors.

FEATURED IN

Investment News ◆ Barron's ◆ The Wall Street Journal ◆ Bloomberg ◆ Horsesmouth ◆ Think Advisor ◆ Wealthmanagement.com

WHO SHE SPEAKS TO

Financial advisors and individual investors

01 **Financial Advisors & Wealth Management Firms**
Practice management and tax planning content for advisor teams and RIA firms.

02 **CPA & Tax Professional Firms**
Sessions built for tax professionals integrating tax planning into their practice.

03 **Industry Associations & Conferences**
Keynote and breakout content for financial services associations and conference programming.

04 **Client & Prospect Events**
Client and prospect audiences, including a documented focus on tax planning and women investors.

WHAT SHE SPEAKS ABOUT

Signature keynote and breakout topics for advisors and their clients

01 **The Rise of the Everywhere Millionaire: Changing the Rules for Spending, Living and Giving**
A talk on how today's wealthy baby boomers can spend, give, and transfer wealth strategically throughout retirement while managing taxes.

02 **Why Tax Planning Is a Must for Every Growing Firm**
A practice management talk for advisory firms on building tax planning into the client experience.

03 **It's Not Just What You Make, It's What You Keep**
Tax planning strategies for clients in or approaching retirement, focused on the decisions that affect what they actually keep.

04 **Ten Powerful Planning Techniques for High Net Worth Clients**
Planning techniques for advisors working with high net worth clients on retirement, legacy, and complex tax questions.

05 **Women and Wealth: The Time Is Now**
A session on the issues that matter most to women investors, drawn from Debra's ongoing work with women and their families.

Additional topics available on request.

PAST AUDIENCES INCLUDE

AICPA ◆ Kitces.com ◆ Holistiplan ◆ Horsesmouth ◆ Thrivent ◆ Elite Advisors Group ◆ RW Baird

