John Taylor

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John Taylor brings over 30 years of experience serving as a wealth transfer and protection specialist to affluent families, business owners, and their related entities. His extensive knowledge of advanced estate planning, business planning and charitable planning strategies and their applications allows him to work closely with your complete financial team, including financial advisors, tax advisors, and legal counsel, to execute the program best suited to meet your objectives.

John's career includes over 20 years working in large financial institutions as an insurance planning specialist. In this role, he has assisted Wealth Advisors, Private Bankers, and Financial Advisors in the design and implementation of numerous financial plans. He focused on protection planning, wealth accumulation, supplemental income planning, and wealth transfer strategies specifically for high income and high net worth clients. During this time, John was recognized as the Top Producer on 4 occasions. Previously, John was an Insurance Agent for Mass Mutual for 9 years where he started in the life insurance industry.

John has been married to his wife Susan for the past 24 years. They live in Greenville, South Carolina with their 3 daughters. John enjoys golf, hunting, Clemson sports, cooking, and family activities.

EDUCATION

Hampden-Sydney College- Hampden Sydney, VA