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National Ethics Association ethics.net

CONTACT:
National Ethics Association (NEA)
Phone: 800-282-1831
Fax: 760-804-7508

Paul S. Taylor

President

Member since	02/08/2007
Member through	06/18/2020
Company	Capital Advisory Group & Tax Planners of Lake Norm
Website	http://www.capitaladvisorygroup.net
Industry	Financial Services

Paul S Taylor

Founder and Owner of Capital Advisory Group, Paul has over 20 years experience in the financial service industry. Paul is a financial professional whose commitment is to provide personalized service to each individual and family that he serves. Paul’s approach to personal finance has two parts. First, he provides comprehensive and detailed explanation on all of the financial strategies that would be applicable to an individual’s personal situation and/or meets their specific financial objectives. Secondly, Paul empowers the individual to be a part of the solution and to take charge of their own financial future. Paul is passionate about helping his community understand financial planning concepts by simplifying them. In an effort to make sound financial advice available to all who seek it, he regularly hosts local workshops, quarterly Lunch and Learns.

As part of his commitment to ethical practices, Paul was accepted as a member of the National Ethics Bureau since 2007. The National Ethics Bureau acknowledges individuals who prove they are committed to upholding the highest ethical standards in their practices. In addition to having two decades of experience in the financial services industry, Paul is a seasoned Investment Advisor that holds NASD license Series 6,7,24 & 65. Through these licenses, Paul is permitted to offer investment advice and has knowledge pertaining to retirement planning, portfolio management strategies, and fiduciary responsibilities. Paul is also the CEO and COO of Capital Investment Advisors, Inc. a Registered Investment Advisory firm that has millions under management. Paul is also a licensed Life, Health, Disability, Long Term Care and Medicare Insurance professional and advises on life and other asset transfer strategies.

In addition to his professional achievements, Paul is an active member of his community. Paul resides in Mooresville, North Carolina with his wife Rena’ and their three children. He participates in the Lake Norman Chamber of Commerce and the Better Business Bureau and has been nominated for the past three years by the elite group Stanford Who’s Who. Paul is very involved with his local Church, is a member of an outreach to the elderly, widows and single mothers and serves as a local Deacon. He enjoys coaching his children’s softball, basketball & football teams. In his free time he enjoys playing golf and boating with his family on Lake Norman.