Taylor McGill

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PROFESSIONAL PROFILE

Financial professional specializing in family, business, and pension planning for clients approaching and in retirement. Award-winning entrepreneur and former CTO with a strong foundation in business development, strategic partnerships, and client relationship management. Known for translating complex financial concepts into clear, actionable strategies — and for bringing the same integrity to every client recommendation.

PROFESSIONAL EXPERIENCE

Retirement Nationwide | *February 2025 – Present*

Financial Professional – Retirement & Insurance Planning

- Advise clients on defensive retirement strategies
- Serve family cases: comprehensive retirement income planning, life/disability/LTC coverage, and legacy protection
- Serve business cases: key person coverage, buy-sell planning, and employer/employee benefit planning
- Serve pension cases: pension strategies to maximize income and survivor protection for public employees
- Licensed in 6 states: WA, ID, OR, MT, AZ, CO
- Affiliated with Ameritas and other top-tier carriers

Symmetry Financial Group | *September 2023 – February 2025*

Independent Insurance Agent

- Obtained Life & Health licensure across 6 states; trained under a former New York Life Advanced Planner
- Developed focus on advanced retirement income and wealth accumulation strategies for business owners, real estate investors, and pre-retirees
- Transitioned production pipeline toward complex planning cases and business market clients

Dobbs Peterbilt | *October 2021 – December 2022*

Sales Consultant – Commercial Trucks

- Managed the entire used truck department for the Liberty Lake branch
- Closed 2–5 trucks per month with an average gross of $35,000 per unit
- Coordinated with service department across a typical 3-week closing cycle on high-value inventory

Jennifer's Auto Sales & Service | *January 2023 – August 2023*

Sales Consultant

- Sold an average of 8–10 vehicles per month in a streamlined, high-touch sales environment
- Built and managed own CRM system in a limited-tech environment; maintained consistent follow-up across all leads

Gee Automotive | *January 2020 – September 2021*

Sales Consultant

- Closed 298 deals in 18 months, including 10 weeks of COVID-related absence
- Maintained a 5.0-star customer review rating throughout entire tenure
- Developed working knowledge of financing, lender requirements, and credit practices across 60+ individual lenders

Codespeed | *January 2019 – January 2020*

Contract Sales & Business Development

- Cultivated strategic partnerships with marketing agencies, development firms, and adjacent professional services
- Managed full sales cycle from initial discovery through proposal, close, and client onboarding

Corlinc | *January 2014 – January 2019*

Co-Founder & Chief Technology Officer

- Ideated and launched a SaaS brand management platform; successfully pivoted the company from fitness to a broader brand market
- Led all business development: tradeshows, strategic partnerships, and enterprise sales
- Secured a Fortune 50 marketing executive to lead rebranding; oversaw digital marketing strategy and funnel development
- Managed full technology stack: AWS infrastructure, payment systems, and customer-facing platforms

EDUCATION

Washington State University | *Graduated 2007*

Bachelor of Arts – Business Management & Operations

Minor: Human Resources | Specialty: Information Technology

LICENSES & CREDENTIALS

Life & Health Insurance Licensed — WA, ID, OR, MT, AZ, CO

References available upon request