



Taos Global Group

INSURANCE

INVESTMENT

ACCOUNTING

Taos Global Group is a professional comprehensive financial services firm, which comprises of Taos Insurance Agency, TZG Accounting LLC and Taos Investment Advisors LLC. We pride ourselves on providing outstanding customer service to all our clients. At Taos Insurance Agency, our goal is to provide insurance coverage that is both comprehensive and competitive. Taos Insurance Agency has been extremely successful in lowering insurance costs for our clients by leveraging our knowledge and relationships within the insurance industry. TZG Accounting LLC offers corporate and individual tax filing, bookkeeping, sales and payroll tax preparation. Taos Investment Advisor LLC focuses on fee-base asset management for your retirement, education planning and other needs.

Peigen Tao, CFA, founder of Taos Global Group, received his Master of Economics in 1992 from Jinan University in Guangzhou, China. He then went on to continue his education graduating with a Master of Business Administration

concentration in Finance in 1998 from Bradley University in Peoria, IL USA. In 2003, he obtained a Chartered Financial Analyst designation, the highest honor in investment industry. Prior to founding Taos Global Group, Peigen Tao, worked with MassMutual Financial Group for 13 successful years providing financial consulting for individual high/middle income investors and small-mid business owners.

Since 2009, Peigen Tao set up Taos Insurance Agency, TZG Accounting LLC and Taos Investment Advisors LLC to build a one-stop financial service station to serve clients mainly in tax preparation, personal investment and insurance related services for both individual and small-mid business owners. We represent many big insurance carriers in 43 states, and some of the companies we work with are, The Hartford, Travelers, Nationwide, Guard, Amtrust, AAA Insurance, National General Insurance, Blue Cross and Blue Shields, and Aetna to name a few. Let Taos Global Group be your helping hand for your business and family.



桃源 集團是由桃源保險、桃源會計和桃源投資組成的一個綜合性金融服務集團。朋友們，我們不知道明天會發生什麼，但可以為了明天而準備。集團宗旨是讓桃源保險為您省錢，會計為您節稅，投資為您賺錢。

桃源集團的創始人陶培根先生1992年畢業於廣州暨南大學，獲經濟學碩士。後從事實業和股票投資。1996年至1998年在美國布萊德 (Bradley University, IL) 深造，獲工商管理金融專業碩士。2003年榮獲金融分析師 (CFA) 職稱。從1998年至2009年擔任為美國麻省人壽保險公司及投資服務公司的投資顧問和保險代理人。

2009年起，陶培根先生在美國創辦了桃源保險，桃源會計以及桃源投資，即桃源金融服務集團。公司現與 Hartford, Travelers, Nationwide, National General Insurance, AAA Insurance 等十幾家美國的大型保險公司保持了良好的合作伙伴關係，能滿足客戶不同層次的需要。桃源保險的服務範圍已遍及全美43個州，服務了一千多家在美國創業的華人企業，成為他們生意上的好幫手。



We are specialized in:

INSURANCE 桃源保險

Restaurant, Commercial, Auto, Truck, Bus, Home, Health & Life Insurance

餐館·商業·汽車·卡車·巴士·房屋·醫療·人壽保險

ACCOUNTING 桃源會計

All States Corporation & Individual Tax Preparation, Accounting & Bookkeeping, Sales Tax Preparation, Payroll & Payroll Taxes, Company Registration, License Application, Financial & Audit Service

全美各州公司和個人報稅·會計及代理紀錄·銷售稅務代理·工資發放及報稅·公司註冊·牌照申請·財務和審計

INVESTMENT 桃源投資

IRA, 401K, Mutual Fund, College Fund, Asset Management

投資·退休金賬戶·401集積退休金計劃·共同基金·教育基金·個人理財·資產管理

INSURANCE SERVICE AREAS 保險服務地區

NY, NJ, CT, PA, IL, IA, AZ, AR, CO, CA, GA, KY, LA, MA, MI, MN, MS, MO, MT, NV, NC, ND, OH, RI, TN, TX, UT, WA, WI, SC, FL, AL, DE, KS, MD, NH, NE, ME, PA, SC, VA, VT, WV, WY, SD, OR

ACCOUNTING SERVICE AREAS 會計服務地區

ALL STATES (全美)



桃源集團

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TAOS GLOBAL GROUP

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