



Client Update

March 11, 2025



A Note From The McIntosh Group

Dear Clients & Friends –

Thank you all for your feedback on our “**Weekly Newsletter**” ... some of which was that **every other week** might be better ... so, here goes!

All **Baird Tax** info is either in the mail or published on **Baird Online**. Instructions on how to access yours are in the “**Resources**” section of this newsletter ... and we are happy to help too!

There are **two attachments** to today’s newsletter ...

The first titled, **Social Security Fairness Act** and what this Act means for retirees and their family.

The second is from our friend **Nick Murray**. His **Client’s Corner** is titled “On Behalf of Your Financial Advisor: A Polite Request”.

While we have had less than 5 calls from clients in recent weeks relating to market volatility, Nick makes some good points and always helps with longer-term perspectives. I have been through many, many market drops too and have learned to love none of them. Our strategy for each of you remains the same and unless your plans have changed, we plan on sticking with the plans we have in place for moments like these. Please do feel free to call any of us regardless ... market volatility is not fun ... but is still a fact. We are here for you.

We want to wish our departing teammate, **Logan Hall**, the best of luck in his new endeavor as a Project Accountant at Marine Solutions. Logan’s pleasant personality and steady demeanor will be missed. We appreciate him and his help in training his successor, **Stella Kyle**. Turns out that Stella is also pleasant and steady! She is excited to learn more about each of you and we’ll feature a short bio of her soon, so that you can get to know her too. Suffice it to say that we feel quite blessed for her to be on our team!

Thank you all for your feedback and for the opportunity to know and serve you all. Please do feel free to call any of us for any reason!

All our best, John for the team

Resources

[Access Baird Online](#)

[Financial Calculators](#)

[Tax Information Center - when you will receive documents , how to access them and more!](#)

[Brian Wesbury Articles](#)

[Baird Wealth Strategies January ~ All That Matters in 2025](#)

Upcoming: 03/19/25 Business Owner Solutions

[Bull and Baird - Perspective](#)

[Bull and Baird - Why Did the Stock Market Do So Well in 2024?](#)

The McIntosh Group

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[Parking Directions](#)

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The McIntosh Group was recently recognized by Forbes/SHOOK Research as a 2025 Best-In-State Wealth Management Team

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