



Client Update

April 22, 2025



A Note From The McIntosh Group

Dear Clients and Friends –

Hoping this note finds you healthy and that you are holding up during these turbulent times when markets are acting out in what is now being referred to as “**Tarriff Tantrums**”!

Many of you have asked me nicely, “**How are you holding up John?**” And while I have never learned to love periods of time like this, I have experienced many, many turbulent times in my 40 years in this role. So, my most consistent response (depending on the day) is: “**There is nothing wrong with me that 30 pounds and 6000 Dow points wouldn’t cure.**” And while it’s meant to be a little bit humorous, it is kind of true.

Perspective matters. Hoping your perspective is in a good place too. We have all worked to prepare to ride through difficult periods and I am so proud of how well you have prepared and are riding thru this little storm as well too. But, as always, **please do feel free to call any of us at any time** for added perspective and encouragement.

On a different note, tax season is wrapping up for most of us. Several states have extended filing deadlines due to weather related issues, including Kentucky, Tennessee, and Florida. So please **let us know if you need any 1099s**, etc. sent to you or your tax person. And if you have finished up your taxes and have an **electronic PDF version of your completed 1040** could you please send it on to us for us to run through our tax planning tool for our next meeting. If not, then could you please ask your tax preparer to send to us.

If you’re extra curious, we can send our report directly to you even before we are planning to meet next. Thank you to the many of you who have already done this ... and thank you to Baird for this **fabulous software and free offering** to help us serve you better!

Attached please find our updated **Key Financial Data 2025 (Tax Guide)** ,, you don’t need to study this, but it does contain a lot of helpful information ,, hope you enjoy!

Again, it’s a pleasure to know and serve you all!

Warmest regards, John for our Group

Resources

[Access Baird Online](#)

[Financial Calculators](#)

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

[All That Matters: Weathering a Storm](#)

[Brian Wesbury Article](#)

[Ross Mayfield - Five for Friday](#)

The McIntosh Group

100 W Main Street, Suite 500, Lexington, KY 40507

[Parking Directions](#)

John McIntosh, CFP®

859-514-6417 jmcintosh@rwbaird.com

Jen Reisenbichler, CFP®

859-514-0158 jreisenbichler@rwbaird.com

Jordan Wilson, CFP®

859-514-0157 jmwilson@rwbaird.com

Jenny Wooldridge, CFP®

859-514-9477 jwooldridge@rwbaird.com

Stella Kyle

859-219-4284 stkyle@rwbaird.com



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

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