



Client Update

February 24, 2025



A Note From The McIntosh Group

Dear Clients & Friends ...

Welcome to this “test” of our new Weekly Newsletter format.

I haven’t communicated much since our **Happy Early Thanksgiving** heads-up email that we were sending you each the 25th Anniversary Edition of **Nick Murray’s classic, “Simple Wealth, Inevitable Wealth”**. Many of you have shared with us how much you enjoyed reading this very easy to digest book and that you found it very helpful. If you haven’t yet, then I hope you will read your copy soon! (and if not the whole book, then at least the 2-page summary at the end of each of the 6 chapters!)

This new “Newsletter” format is designed to give you more easy access to many of the additional resources that we now have at Baird. By clicking on the ‘hyperlink” you should be able to directly access the resources. (Including **Brian Wesbury**, whose work some of you love and whose work some of you don’t. If you love Brian and his thoughts please click on the hyperlink, and if you do not want to read his thoughts, then please do not click on the hyperlink.)

Also, please find easy to access links **to phone numbers and emails of each of our McIntosh Group teammates**. In the coming months, we will offer brief introductions to help clarify roles and responsibilities and to help us all get to know each other better!

Finally, in the coming months we will start to present our **new Crystal Ball Awards**. Over my nearly 40 years of being in this role of financial advisor, many of you have asked in jest (and some of you not in jest) what my or my firm’s crystal ball was telling us these days? And while we all kind of wish we knew the future, we all know that ultimately, the future is unknowable. So, it’s back on each of us to prepare in the very best way possible for ourselves and our families. We are finalizing the criteria and the wording for what we believe are the best practices that an individual or a couple can employ on a regular basis “to have done everything a person who doesn’t own a working crystal ball can do to have planned for a successful outcome.” (my words)

Our goal is to communicate those best practices and help you to make them your **regular habits and rhythms** to hopefully give you the **confidence and peace of mind** you deserve in this very uncertain world!

Please enjoy this first attempt at our newest attempt to communicate with you and give us your feedback. We hope this makes it even easier to reach back to us as your needs arise.

It continues to be our honor and privilege to know and serve you all.

All our best, John for our team

Resources

[Access Baird Online](#)

[Financial Calculators](#)

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

[Bryan 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?](#)

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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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