



The Vitale Group

446 East Main Street
Bowling Green, KY 42101
270.781.1691
vitalegroup.bairdwealth.com
thevitalegroup@rwbaird.com



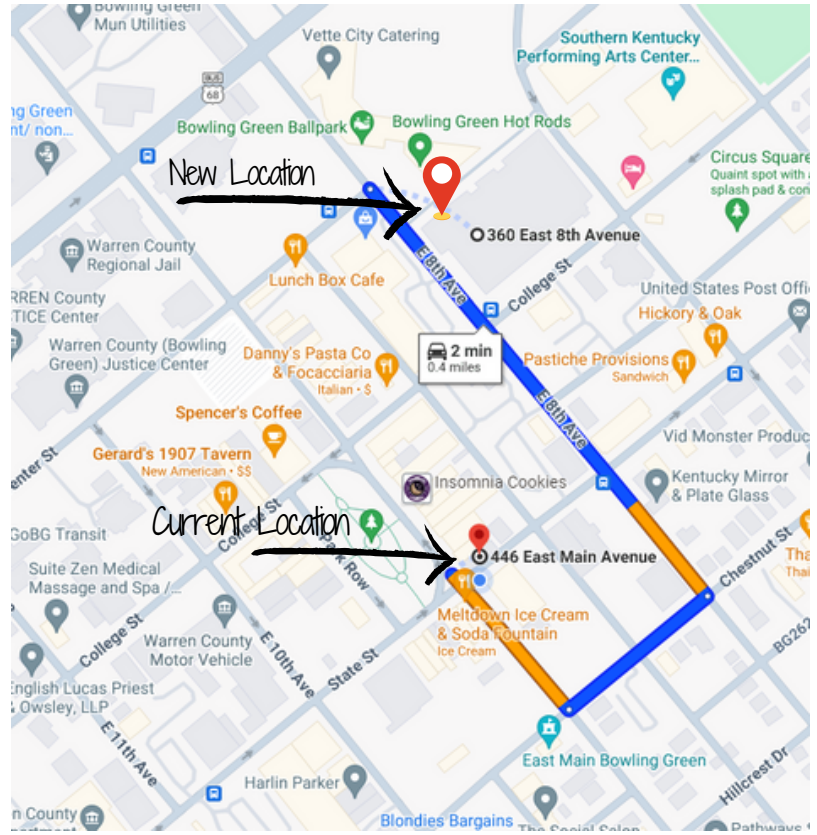
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- Shannon Vitale**
Director | Branch Manager |
Financial Advisor
- Mac Jefferson, CFA, AAMS®, CWA®**
Director | Financial Advisor
- Dennis Young**
Senior Vice President | Financial Advisor
- Matthew Garrett, CFP®, QPFC®, CPWA®**
Financial Advisor | Vice President
- Michael Fisher**
Financial Advisor
- Monica Taylor, CFP®**
Assistant Vice President |
Associate Financial Advisor
- Gwen Reynolds**
Assistant Vice President |
Senior Client Specialist
- Sandra Riehn**
Client Assistant
- Kelsey Cooksey**
Client Assistant
- Gena Gooding, CPA**
Client Specialist

We're Moving!

We are excited to make the move on March 22nd to our brand new office located next to the Hot Rod's Stadium, on the second floor of the Stadium Park Plaza building. The first day of business at our new location will be **March 25, 2024**. We are looking forward to showing everyone the new and improved space!



**Our new address will be: 360 E 8th Ave #211,
Bowling Green, KY 42101**

We are honored to be named a 2024 Forbes Best-In -State Wealth Management Team

Our group was recently recognized as a 2024 Best-In-State Wealth Management Team by Forbes/Shook research. These rankings were based on data as of 3/31/23, published 1/9/24. This incredible recognition is based on quantitative and qualitative data, including in person interviews, compliance records, and revenue produced.

We are honored to be included in this year's Best-In-State Wealth Management Teams list, but the real award is being able to work alongside generations of wonderful families and businesses. We are continuously committed to providing a high level of service to our clients.

To view the report [CLICK HERE](#)



Congratulations to Matthew Garrett for Obtaining his CPWA® Designation!

The Certified Private Wealth Advisor (CPWA®) designation is an advanced certification for experienced advisors who work with high net worth and ultra-high net worth clients.

This certification will allow our team to identify and analyze the unique challenges many of our clients face and help implement specific strategies to minimize taxes, protect assets, maximize growth, and transfer wealth.

We also want to celebrate Matthew's unwavering commitment to our clients and firm by announcing his promotion to **Vice President. Congratulations Matthew!**

2024 Tax Season



With the 2023 tax filing season upon us, we would like to encourage our clients take advantage of our complimentary Tax Return Review service. Some clients took advantage of this valuable service last year, and we hope to expand the number of reviews we provide in the coming year.

While Baird does not provide tax advice, we do have in-house experts who are adept at analyzing tax returns to identify opportunities to align your wealth management plan with your tax situation. This review will ensure we understand your income sources and deductions, as well as current items that may carry over into a future year. In addition, the review process will provide you with a complete understanding of your sometimes hard-to-interpret tax return.

All we need to get started is a copy of 2023 filed tax returns which you can send to us via mail, secure email, upload through Secure Document Exchange on Baird Online, or drop off at our office during regular business hours.



To learn more about this service, please contact our office at (270)-781-1691.

The Economy in an Election Year

Wednesday, March 13, 2024


11:00 a.m. – 12:00 p.m. Reception
 12:00 p.m. – 1:00 p.m. Presentation and Q&A
Lunch will be served

Join Michael Antonelli as he discusses exactly what you need to know to invest in 2024, a year that will be filled with chaotic noise.

He will talk about whether we are on the verge of a recession, how stock markets do after big up years, and will detail everything you need to know about how markets view Presidential Elections.



Michael Antonelli
CFP®, CPWA®, CIMA®
 Private Wealth Management
 Market Strategist

 **Knically Conference Center**
 2355 Nashville Road
 Bowling Green, KY



Speaker Bio

As one of the industry's leading voices on the financial markets, Michael has a wealth of experience and knowledge to share. The talk will be followed by a Q&A session, allowing you to engage with Michael and ask questions. To learn more about Michael, please visit his [Bull & Baird blog](#).



Kelsey, Michael, Gwen, and Sandra passing out ginger bread houses - SKyPAC Light Up BG



Sandra and Michael with ginger bread kits - SKyPAC Light up BG



Michael and Gwen ringing the Salvation Army bell



Bob Kirby and Mac ringing the Salvation Army bell



Our team on the square during Light Up Bowling Green Festival - Fountain Square



Gwen, Sandra, Monica, Kelsey and Gena showing off the holiday decorations



Michael, Monica and Gwen with Lego Big Red



Michael working the intern fair at WKU



The girls celebrating Valentine's Day

UPCOMING EVENTS

To stay up to date with upcoming events click the link below:

<https://vitalegroup.bairdwealth.com/events>



Visit us on Facebook: <https://www.facebook.com/thevitalegroupatbaird/>