

THE PERRY RICHEY GROUP QUARTERLY NEWSLETTER

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BAIRD

The Perry Richey Group
Private Wealth Management

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The Perry Richey Group

Front photo pictured left to right: Melissa Steele, Savannah York, Andrew Boyles, Brooke Cassady, Shawn Perry, Jacqueline Hunt, Drew Richey, Claire Wilson, Josh Marson, Brooke Schakat, and Michelle Humphrey.

Shawn M. Perry, CFP®, CPWA®
Managing Director
Branch Manager

N. Drew Richey, CFP®, CRPS®
Director
Financial Advisor

Joshua J. Marson, CFP®, CIMA®
Vice President
Financial Advisor

Andrew D. Boyles, CFP®, CPWA®, QPFC®
Financial Advisor

J. Brooke Cassady, CFP®, AFC®, EA
PWM Financial Planner

Claire A. Wilson
Associate Financial Advisor

Jacqueline H. Hunt, CFP®, CPWA®
Assistant Vice President
Branch Administrative Supervisor

Melissa Steele
Senior Client Specialist

Brooke Schakat
Client Assistant

Michelle Humphrey
Client Assistant

Savannah York
Client Assistant

**Social Security
Questions Answered**

**Top Next Gen
Wealth Advisor**

Baird BG is Merging

**Supporting Our
Community**



The Perry Richey Group
Private Wealth Management

**C12 Marriage
Workshop**

**Brooke Cassady's
New Designation**

Outside the Office

**Care by
Shawn Perry**

BAIRD BG IS MERGING!

We are excited to announce that we will soon have some new office mates! The team and financial advisors currently located at the Baird branch on Fountain Square—this includes the Vitale Group and advisors Bob Crawford and Dennis Young—will be joining us here at Stadium Park Plaza in the next few months. **Your Perry Richey team will not be changing in any way**, but our office space will! Our office is currently undergoing an expansion of the far end of our space and will take over most of what was Mariah's Banquet space. Our existing space will also get an upgrade! As we know more about the timing and details of the renovation process, we will pass it along. We do not anticipate any interruption in operations or service to our clients during this time. This is an exciting time for our office and we look forward to welcoming in our new colleagues soon!

FORBES TOP NEXT-GEN WEALTH ADVISOR

Drew has been recognized by Forbes as one of the top young wealth advisors in Kentucky, which reflects Drew's expertise and success in serving our clients. Drew works hard to see that his clients and team are taken care of. Congratulations, Drew!



TEAM RETREAT



In August, the Perry Richey team participated in a business retreat with two like-minded Baird teams. During the session, we collaborated on business ideas and strategies, shared best practices, and got lots of ideas to make our client experience even better. Our dedication to growth and learning is unending, and we appreciate opportunities like these!

BOOKS WE LOVE

Recently, several of us read *Unreasonable Hospitality* by Will Guidara and *Atomic Habits* by James Clear. We loved both books! Let us know if you have a favorite book you think we would like or benefit from reading.



CARE

Our team talks often about viewing our engagement with clients through a lens of **care**. We genuinely believe our greatest responsibility to clients is to care for them, and our team's vision is stated as such: *we exist to care for our clients, teammates, and community with compassion and excellence*. We celebrate anytime we get to love on and care for you!

Yes, we are financial advisors, and there are many ways we serve our clients. Constructing a well-diversified portfolio, building a financial plan, facilitating estate planning discussions—we love serving in these ways. But we get the same joy and satisfaction by caring in other ways, too. Our ultimate viewpoint on care comes from a background of faith. We believe there is a Creator and that each of us were created in the image of God. As such, all humans deserve dignity and respect, and we can show that by serving, loving, and caring for one another. We take honor in supporting you during your most vulnerable and uncertain times. We desire to be trusted friends, always there when you need us most.

Care became front and center to me when I was diagnosed with throat cancer on March 15th of this year. When I couldn't work for a few months, my Perry Richey team carried me, lifting my work responsibilities and caring for me and my family. I also received much care from our clients, getting so many text messages, cards, and phone calls. Our family felt incredibly loved during the most difficult time, and for that I am appreciative.

I have since completed chemotherapy and radiation treatments and recently received an all-clear PET scan and heard the words **cancer free**. I was able to see our vision statement play out in my own life, and lessons come to us when we least expect them. Here are a few things God taught me through this trial:

- I am a very impatient person. I have become more patient over the last 6 months but have much more work to do.
- I was humbled by the number of people praying for me.
- I have always been a person who sees the value and importance of handwritten notes and tries to send many. I found myself really enjoying being on the receiving end of this kindness.
- I am not self-sufficient or independent. I am needy.

I read a book a couple of years ago, *From Strength to Strength*. It was a wonderful book so I re-read it again this year, uncovering the following excerpt that I had underlined previously:

*People don't realize their unhealthy attachments in life until they suffer a loss or an illness that makes the important things come into focus. Most researchers have found that most survivors of illness and loss experience post-traumatic growth. If you talk to them, they will say they no longer bother with the stupid attachments that used to weigh them down. The threat of losing their lives prematurely took a jackhammer to the jade encasing their true selves - the **why** of their lives.*

I'm grateful to be on this side of cancer, and thankful to be back at work caring for our clients and my teammates—both of which are a big part of my **why**.

-Shawn Perry

SUPPORTING OUR COMMUNITY

LITTLE BLACK DRESS



Several of us celebrated with the Center for Courageous Kids by attending the Little Black Dress Event. At CCK, they make sure kids living with medical diagnoses feel the way every kid should feel included and loved! Each year, they open their gates to more than 3,000 campers.



PEARLS OF WISDOM LUNCHEON

The Chamber hosted a Pearls of Wisdom Ladies Luncheon where Brooke S. and Claire heard from several distinguished women leaders in Bowling Green.



LISA RICE LIBRARY

Brooke S. and Claire attended the ribbon cutting to celebrate the renaming of the Warren County Public Library to the Lisa Rice Library in downtown Bowling Green. The event paid tribute to Lisa Rice who has been an advocate of learning and literacy in Bowling Green since 1985.

HOPE HOUSE GOLF SCRAMBLE

We were the title sponsor for the 13th annual Swing for Hope golf scramble in August held at Bowling Green Country Club. The event raised over \$65,000 to benefit Hope House Ministries.



MARKET FORCES AND ECONOMIC TRENDS

YOU ARE INVITED! Please join us to hear from Don Rissmiller of Strategas – A Baird Company, as he covers the current market landscape, the potential for a recession, and his perspective for the remainder of 2023. This event is Tuesday, October 17th, from 11:30am to 1:00pm at the Knicely Conference Center on 2355 Nashville Road. Lunch will be served. **Registration is required to attend. If you have not already registered and want to attend, please let Michelle know by Tuesday, October 10th.** Call the office at 270-467-9664, or email mhumphrey@rwbaird.com, or text her at 270-467-9672.

SOCIAL SECURITY QUESTIONS ANSWERED



In August, Andrew presented valuable information about Social Security retirement benefits. If you missed the presentation, you can read the blog or listen to the podcast which are both posted on our website.

BAIRD ONLINE MULTI-FACTOR AUTHENTICATION

Compromised login credentials are the leading cause of unauthorized access that can result in a data breach. To further prevent unauthorized access, Baird has added an additional layer of security for increased protection of your information. For your security, you will be prompted to quickly verify your identity before you can sign in to your accounts. You will choose your preference for delivery of the verification code and then enter the code that was provided. You can call our office and ask for Savannah for assistance if you run into any issues with this new authentication.

All Baird Online accounts have Multi-Factor Authentication (MFA), however it may not be triggered if log in attempts continuously come from the same device / network. Upon request we can set MFA to trigger every time, prompting for an extra layer of security on each login attempt regardless of device. Please call into Baird Online directly and we will be happy to help. Baird Online Support can be reached at (888) 212-8843 Monday through Friday 7:00 am to 6:00 pm CST.

BROOKE'S NEW DESIGNATION

Brooke Cassidy has been working over the last few months to gain her Enrolled Agent (EA) designation. All three exams are passed as of May! With this complete, our team will have access to tax planning software to help our clients in collaboration with their CPAs and other tax professionals.



OUTSIDE THE OFFICE



Brooke C. had her precious baby girl in August. Welcome Parker Grace Cassady!



Claire treated her oldest nephew to some end-of-summer fun at Holiday World before he started kindergarten.



Michelle and her husband, Stephen, went to a concert at Red Rocks Amphitheater in Colorado.



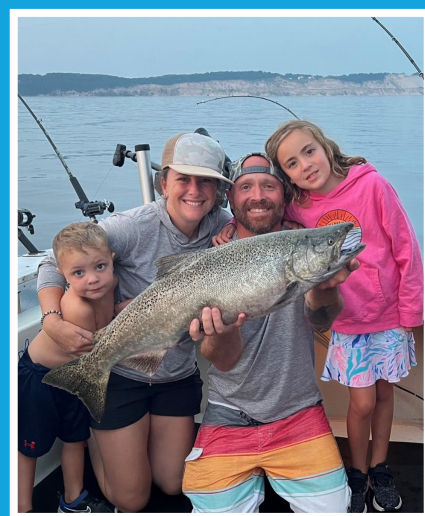
Drew summitting Mt. Massive in Leadville, Colorado, while out west for his mountain bike race.



Brooke S. spent a long weekend in July with friends in Ft. Lauderdale.



Savannah and her family spent the summer at the ballpark and going camping.



Josh and his family with a king salmon off the Northern Coast of Lake Michigan.



Jac and Ben attended their first Cincinnati Reds baseball game at the Great American Ball Park.



Natalie and Shawn went on a date to celebrate being cancer-free.

THE LEADVILLE 100 MOUNTAIN BIKE RACE



A huge shout out goes to Drew Richey on his recent mountain bike race. Drew competed in the Leadville 100 Mountain Bike Race in Colorado. This race consists of high altitude, extreme Rocky Mountain terrain starting at 10,152 feet, climbing to 12,424 feet. The Leadville Trail 100 MTB race is one of the most prestigious endurance cross-country events in



the world. Drew finished this race in 11 hours, 27 minutes and 37 seconds, which earned him the coveted belt buckle!!! WAY TO GO, DREW!

CREATED FOR CONNECTION MARRIAGE WORKSHOP

Enrich your marriage and take your relationship to the next level. Experience a new connection and have conversations like never before. Set aside time to focus on your spouse and your marriage in this engaging workshop presented by Lindsey Castleman and Aron Strong of inRelationship, counselors who consider themselves to be guides, helping married couples navigate the complexities of relationships. We are offering a discounted rate to our clients if you are interested in participating. Let us know as soon as possible as seating is limited.

RELATIONSHIP

Created FOR Connection

MARRIAGE WORKSHOP

A Workshop on Communication in Marriage Unlike Any Other

The Perry Richey Group

The Perry Richey Group & C12 Central KY present
inRelationship
with Lindsey Castleman & Aron Strong

Christ Fellowship Church
601 Graham Drive
Bowling Green, KY

November 3, 6:00 pm-9:00 pm, dinner included
November 4, 9:00 am-2:00 pm, lunch included

\$100 per couple