

NEWSLETTER

THE HOBGOOD EDGE GROUP



JOIN BAIRD ONLINE



Baird Online, the client-exclusive area of our Website, is available free to our Baird clients. Baird Online provides detailed, real-time account information, 24 hours a day seven days a week.

JOIN BAIRD 360 WEALTH

Access 360 Wealth to view your net worth and all of your financial accounts in a single location. You can also build a budget, analyze your income and expenses, review your cash flow and create customized rules for categorizing your transactions.



»»» WHAT WE OFFER YOU!!! «««

We offer a comprehensive range of client services, including some you may not be familiar with. To explore the full list of services available to you, please scan the QR code. If you have any questions or would like more information about any of the services listed, don't hesitate to contact us.

Financial
Planning

Estate & Tax
Planning

Charitable
Giving
Strategies

Risk & Liability
Management

Investment
Management

Trust
Services

Retirement
Planning

Goal
Setting



LEMON SUGAR COOKIES



This **lemon cookie** recipe is **chewy** on the outside and **soft** on the inside. And they are just **puffy** enough! And the lemon flavor is everything you'd want it to be in a cookie. The **fresh lemon zest** really gives them a **bright lemon** flavor.

CAPRESE DIP



This **caprese dip** will be your new favorite **appetizer!** You can't beat the flavors of **tomatoes** tossed in fresh **garlic** and **basil** and the **gooey cheesy** texture. Serve it with **crusty bread** or **crackers** and enjoy the dip version of the **classic salad** in a few **simple** steps. It's a perfect **warm summer dip** thanks to the **basil** and **tomatoes**. If you love **caprese salad**, you're going to love this **caprese cheese dip!**



»» BULL & BAIRD: WHEN UNCERTAINTY REIGNS

The spring season brings blooms and sunshine, but also severe storms. Michael Antonelli analyzes the chaotic stock market in Spring 2025, where tariffs create volatility. Like weather, stock portfolios are affected by unexpected changes, and behavior, not knowledge, is key to navigating uncertainty. When faced with turmoil, whether in weather or markets, it's vital to remain composed and assess the situation with your Financial Advisor when the storm passes. Scan the QR Code to read more!



Susan and Kevin went to the **Kentucky vs. Alabama** game in Lexington. They had a great time even though the **cats** lost!



Susan had a great time in **Houston** visiting **family**. They were even able to go to the **Houston Rodeo!!**



SNOW DAY FUN!!!



CELEBRATED 16 YEARS TOGETHER!!



OUTDOOR FUN!



SUNSETS ON THE FARM



STELLA TURNS 2!



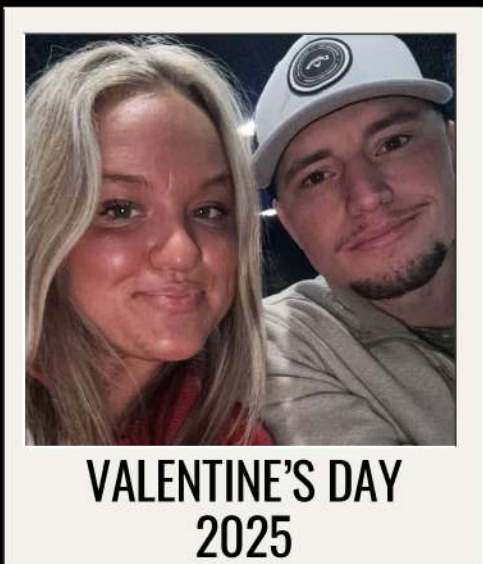
SCARLETT'S DANCE RECITAL



JEREMY & ADDISON AT A CATS GAME!



FIRST HOME TO FOREVER HOME!
Taylor's family moved out of their first home and into their forever home. Even enjoyed a little picnic at the new house!



**VALENTINE'S DAY
2025**



**CODY JOHNSON
CONCERT**



**BAIRD MARCH
MADNESS PARTY**



**Newest member
of the Hobgood
Family!**



EVERYONE CELEBRATING AT JEREMY'S 50TH SURPRISE BIRTHDAY PARTY!



HALEY'S BIRTHDAY PARTY!



ADDISON VISITS WASHINGTON DC!



ADDISON'S SENIOR NIGHT!

HALEY'S 8TH GRADE NIGHT!



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This Year's Tax Return Could Lead to Future Tax Savings

We all know how challenging preparing a tax return can be – chasing after statements and organizing receipts, just to end up with a big tax bill. But what if all your hard work could lead to future tax saving opportunities?

One of the complimentary services we offer is a Tax Return Review. While Baird does not prepare tax returns or offer tax or legal advice, our team can review your tax return and work to ensure the decisions we make together are as proactive and tax-efficient as possible. Here's just some of what a Tax Return Review can do for you:

Tax-Efficient Portfolio Management

A thorough review of your tax return allows us to discuss different investment approaches, which may lead to a more tax-efficient portfolio strategy.

Retirement Strategies

This review can provide new insight into how best to make distributions from your retirement accounts. It could also lend insight into Social Security and Medicare planning or if a Roth conversion is appropriate.

Same-Year Tax Strategies

This review can inform our capital gains strategy for the current year, or if we should explore tactics like tax loss harvesting.

Ongoing, Proactive Wealth Management

Reviewing your tax return lets us collaborate more effectively with your CPA and other advisors, as well as plan for future tax law changes, such as the scheduled sunset of 2017's tax cuts.

Best of all, the Tax Return Review requires minimal effort on your part. Simply complete your tax return as you normally would and send us a copy for review – and we will take care of the rest. You have many options to choose from when sending your return:

Transfer your files securely via Baird Online's Document Exchange

You can find Document Exchange under the Documents tab.

Mail a copy to our office

You can address your returns to BAIRD at 1035 Frederica Street, Suite 100, Owensboro, KY 42301. We recommend delivering them directly to the post office rather than leaving them in your mailbox.

Drop off a copy at our office

You can drop off a copy during regular business hours.

8AM - 4:30PM MON-THURS

8AM - 3:30PM FRI

CLOSED - SAT & SUN

There is a tax angle to every financial strategy you consider, and understanding the impact of taxes is crucial to making the right decisions for you. If you have questions about the benefits or process of the Tax Return Review, please don't hesitate to give our team a call.

Source: Baird Private Wealth Management. Baird does not offer tax and/or legal advice. The information offered is provided to you for informational purposes only. Robert W. Baird & Co. Incorporated is not a legal or tax services provider and you are strongly encouraged to seek the advice of the appropriate professional advisors before taking any action.

REACH OUT FOR MORE INFORMATION!!!



The Hobgood
Edge Group

1035 Frederica St
Owensboro, KY 42301

Upcoming Events

April 19th

Easter Adventure @ Reid's Orchard

April 26th

Annual Native & Perennial
Plants Sale

BBQ & Barrels @ Downtown
Owensboro

May 9th-10th

May 10th

YMCA BBQ 5K @ Downtown
Owensboro

June 6th - 8th

River City Bike Expo @
Owensboro Convention Center

June 8th - 9th

Strawberry Festival @ The
Cottage

June 14th

Porch Fest @ Griffith Avenue

June 25th - 28th

ROMP @ Yellow Creek
Park

