



The Mahurin Group

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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®**
Financial Advisor
- 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 love summer; traditionally a time to relax, travel, enjoy farmers markets and swimming pools, summer often is here and gone before we know it. This year, we encourage you to actively pursue a “Summer Slowdown” to help you savor each remaining moment of the season

Here's a few financial items to start to think about going into the next season:

- **Do you have a child going into high school? It might be a good opportunity to revisit your 529 Plan allocation.**
- **Are you 73 years of age? Following the passing of Secure Act 2.0, the age at which the IRS requires you to begin taking withdrawals from retirement accounts increased from 72 to 73.**
- **Are you charitably inclined? If you are over 70 1/2 you can make a Qualified Charitable Distribution that may be advantageous for your tax purposes.**
- **Did you take an amazing family vacation? We would love to hear all about it and will also make sure we have a travel budget incorporated into your financial plan.**

We hope you found these tips helpful and that you have a wonderful rest of your summer. If we can be of assistance as we move from summer into fall, please reach out to one of our team members and we will be happy to assist you.

Congratulations to our new shareholders!

Being an employee-owned firm is one of the many aspects that makes Baird great. This allows us to focus on your long-term needs and fosters a company culture dedicated to providing the best service for our clients.



Gena and Michael are our newest shareholders, making everyone in our office a Baird Shareholder!



Baird was recently recognized by Fortune on both their Best Companies to Work For list and the Best Workplaces for Millennials for 2023. This is the 20th consecutive year making the Best Companies to Work For list and the 8th consecutive year on the Best Workplaces for Millennials list.

Just as we prepare our clients for life changing events, our team has evolved through many changes over the past few years. Bob Kirby retired in 2020 and as you know, our founder Pete Mahurin passed away in 2021. Both instilled their values and guidance in all of us and we are all grateful for the years we were able to learn from them. We have recently expanded our team by adding two new Financial Advisors that have allowed us to become a diverse, multi-generational team fully committed to our clients and the legacies they envision. Michael Fisher joined us after completing our Baird Financial Advisor training program in 2022 and Dennis Young, a seasoned advisor with over 26 years of experience, has served Hilliard Lyons/Baird clients in Elizabethtown and the surrounding communities.

In addition, you may notice in future statements and communication that our team name has changed. This is an industry standard practice when a senior member retires or passes away. Our team will continue to serve and guide you with over 200 years of combined financial experience.

We encourage you to visit our website to see how we are paying tribute to two of our favorite people.

vitalegroup.bairdwealth.com



The Vitale Group

HAPPY 30th ANNIVERSARY



Join us in celebrating Sandra Riehn's 30 years with Hilliard Lyons/Baird. She is our task master, revival reminder, big-hearted teammate who makes all of our days better! When asked some questions about the last 30 years, here's what she had to say.

- ***I LOVE WORKING WITH THE PEOPLE ON OUR TEAM -THEY ARE ANOTHER PART OF MY EXTENDED FAMILY.***
- ***THIRTY YEARS WENT BY WAY TOO FAST! I CAN REMEMBER HAVING TO FILL OUT ORDER ENTRY TICKETS FOR BUYS/SELLS OF STOCKS, MUTUAL FUNDS AND OPTIONS. AND THOSE POSTING BOOKS!! EVERY TRADE IN AN ACCOUNT HAD TO BE WRITTEN DOWN IN A BOOK. THINGS SURE HAVE CHANGED!***
- ***MY FAVORITE WORK MEMORY WOULD BE SURPRISING SHANNON WITH LESLIE JORDAN OR HER BIRTHDAY WITH THE HUBCAP!! GETTING TOGETHER AFTER WORK ARE THE MEMORIES THAT I THINK OF THE MOST.***

MEET OUR SUMMER INTERNS!



Daniel Myers is majoring in Finance with a concentration in Personal Finance and Business Finance and also obtaining his Applied Data Analytics certificate at Western Kentucky University. He's loved working with our team to have a hand in every part of the business and seeing Baird's core values displayed. He hopes to work in the financial planning industry and plans to take his CFP® exam.



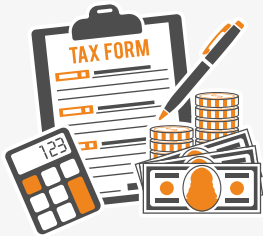
Alexia Cassidy is obtaining her Consumer Economics and Family Financial Counseling degree, with an emphasis on Personal Finance at the University of Kentucky. She has enjoyed building connections with everyone in the office and is an expert organizer. Upon graduation, she would like to receive her Accredited Financial Counselor Certification.

Happy Birthday, Kelsey!



We love ice cream and we love birthdays so what better way to celebrate Kelsey's special day than with a trip to The Meltdown Ice Cream & Soda Fountain!

New Planning Opportunity - Tax Return Reviews



Have you ever wished you could look at your tax return and understand the forms and numbers on the pages before you? If so, we have great news for you!

Our branch now has the capability to perform in-house reviews of your most recently filed income tax returns. This complimentary service allows us to provide you with a greater understanding of your tax return, the amount and rates of the various taxes you pay, carryovers of items to future years, and many other details you may not fully understand. It also allows us to analyze your returns to identify potential financial planning opportunities and help align your wealth management plan with your tax situation.

Please contact your financial advisor to ask how you can take advantage of this valuable new service!



Save The Date!



DATE: October 17, 2023

TIME: 11:30 AM - 1:00 PM CST

SUBJECT: Strategas: Market Forces and Economic Trends

 **Knicely Conference Center**

Strategas - A Baird Company - provides market strategy and perspective tailored to help our clients better understand what is happening in the world today and how it can impact portfolios and plans.

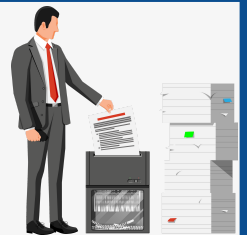
For more on Strategas [CLICK HERE](#)

Donald J Rissmiller, Vice chairman and Chief Economist of Strategas, will be speaking at our Strategas client event on October 17th, 2023.

To view Don Rissmiller's Bio [CLICK HERE](#)



THANK YOU TO EVERYONE WHO PARTICIPATED IN OUR SUMMER SHREDDING EVENT! WE WERE ABLE TO SECURELY SHRED ~3,000 POUNDS OF DOCUMENTS.



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