

Our CERTIFIED FINANCIAL PLANNER™ Professionals:

John M. McIntosh, CFP®
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The benefits of Financial Planning

As one of our clients, you will have access to deep and specialized expertise to help build a customized plan for you and your family. Our goal is to help you make clear, well thought out decisions that will impact the rest of your life. Financial Planning is one of the most important steps to take in managing your assets and planning for the future.

Financial plans designed by The McIntosh Group are done by CFP® professionals, who meet rigorous education and experience requirements. Our CFP® designation means that we have passed a comprehensive 6-hour CFP® Certification Examination, which tests our ability to apply financial planning knowledge in an integrated format.

What a Financial Plan consists of:

- Establishing financial goals and objectives
- Retirement income planning
- Recommending an investment strategy appropriate to your goals, timeline, and tolerance for risk
- Coordination with a tax professional
- Planning for a child's or grandchild's education
- Life insurance planning
- Estate planning
- Charitable giving strategies

Outcomes of working with us

- Confidence and clarity around your finances, both now and in retirement
- Knowing how much to save now to build a rising stream of income in retirement
- Knowing when to take Social Security
- Protecting the family's important assets when a loved one passes or becomes disabled
- Planning for your children's education
- Knowing how to achieve your charitable objectives in a tax efficient manner
- Allocating for a new home or planning for a new family member
- Having the ability to allocate cash safely for a new business or investment strategy

Even if you already have a financial plan, it's in good form to revisit the plan and get a second opinion to ensure you have a solid foundation upon which you can base sound financial decisions. If you are interested in having Baird create a customized financial plan for you or would like to discuss any other financial issues, please contact us at 859-514-0158.

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