

# Yesbeck Brindley Group

**BAIRD**

Private Wealth  
Management

Summer 2025

Hello & Happy Summer!

As we cross the midway point of 2025, we hope everyone is enjoying the warm weather, a vacation with family or friends, and the humidity - if you're into sweating immediately upon going outside. We write this newsletter with the markets in a much different place than they were in the spring, and (mostly) for the better. With the recently completed roundtrip from all-time highs in February, to a low on April 8<sup>th</sup>, and back to the highs earlier this month, this has been one of the quickest rebounds in market history. Still, tariffs and the corresponding volatility they bring have far from left the discourse. Additionally, the recent finalization of landmark tax legislation has individual investors and businesses alike wondering what the impact will be. Baird and its partners have shared several timely pieces on these topics, some of which are included below. If one of them piques your interest or inspires a question, let us know!

We appreciate your trust in our team, and look forward to a strong second half of the year. As always, it is a privilege to serve you.

Best Wishes,

The Yesbeck Brindley Group

## 'One Big Beautiful Bill' Content

Just before the July 4<sup>th</sup> holiday, Congress passed a significant piece of tax legislation, coined the 'One Big Beautiful Bill.' This bill has numerous ramifications for individual filers and businesses. Below are pieces specifically addressing what to pay attention to, both in the form of new tax law and extensions of previously established provisions.

Strategas: [Key Takeaways from the Tax Bill](#)

Baird: [The 'One Big Beautiful Bill Act': How it May Impact You](#)

Special Edition Wealth Strategies: Breaking Down "One Big Beautiful Bill Act"



Join us for an exclusive webinar with Tim Steffen, Director of Advanced Planning, as he provides an analysis of the "One Big Beautiful Bill Act" (OBBBA) and its potential impact.

Thursday, July 24<sup>th</sup>, 12:00pm-1:00pm (CT)

[Register Here](#)

## Featured Articles



### Strategas Quarterly Market Commentary

Strategas examines the key drivers behind a surprisingly strong second quarter in their latest quarterly note. Read it [here](#).

If you'd like a more frequent breakdown by Strategas, check out their weekly Market Strategy videos with Baird Investment Strategist Ross Mayfield [here](#).



### All That Matters: What Did We Learn?

In the latest episode of the 'All That Matters' video series, Mike and Ross discuss what April's market volatility—and Warren Buffett's wisdom—can teach us about investing through uncertainty. Watch it [here](#).



### In the Markets Now: Investing at All-Time Highs

All-time highs can make investors nervous to dive in, but in this piece, Ross looks to the data for a counter-argument. Read it [here](#).



### Cyber Self-Defense: How To Avoid These Common Scams

Between online commerce and social media, we're all spending more time on the internet these days. So are cybercriminals. Learn to protect yourself from their most common scams [here](#).



### Depreciating Financial Assets

Everything is more expensive these days, and the automobile you drive is no exception. In this post, Ben Carlson provides some facts on the cost of vehicle ownership, as well as which makes and models depreciate the fastest after being purchased. Read it [here](#).

## Wealth Strategies Webinars

### July - Two Wealth Strategies Sessions!

7/16 - Plan your Legacy: The Essentials of Estate Planning

Watch the replay [here](#).

7/24 - See the 'One Big Beautiful Bill Act' section for the registration link to this special edition of Wealth Strategies

### Future Wealth Strategies Topics:

8/20/25 Cybersecurity/Identity Theft

9/17/25 Charitable Giving

10/15/25 Medicare



Use [this link](#) for more information on past and upcoming Wealth Strategies discussions.

8000 Excelsior Dr, Madison WI 53717-1914 • phone 608-830-3500 • toll free 800-888-4792 • fax 608-830-3550 • [yesbeckbrindleygroup.com](http://yesbeckbrindleygroup.com)

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNERTM and CFP® in the U.S.

Robert W. Baird does not offer tax or legal advice.

If you do not wish to receive further Baird email announcements, reply to this email with "Remove Me" in the subject line by [unsubscribing](#).

Robert W. Baird & Co. Incorporated. 777 East Wisconsin Avenue, Milwaukee, WI 53202. 800-RW-BAIRD.

MC-28186W.