

**BAIRD**

The Vitale Group

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- Shannon Vitale**  
Managing Director | Financial Advisor
- Mac Jefferson, CFA, AAMS®**  
Director | Financial Advisor
- Dennis Young**  
Senior Vice President | Financial Advisor
- Matthew Garrett, CFP®, QPFC®, CPWA®**  
Vice President | Financial Advisor
- Monica Taylor, CFP®**  
Assistant Vice President | Associate Financial Advisor
- Gwen Reynolds**  
Assistant Vice President | Senior Client Specialist
- Gena Gooding, CPA**  
Client Specialist
- Sandra Riehn**  
Client Assistant
- Kelsey Cooksey**  
Client Assistant



Spring is a time for new beginnings, new growth and beauty all around. Our team created so many wonderful memories in our downtown location and we are excited to make new ones just a few blocks away. We have settled in nicely at our new location at 360 8th Avenue, Suite 211 and cannot wait for you to come and visit so we can show you around.

We want to make sure you are aware of some upcoming events to add to your calendar:

**\*\* Tuesday, June 4th - Baird's Ribbon Cutting & Open House**  
360 8th Ave, Suite 211  
Bowling Green, KY  
4:30pm - 6:00pm

**\*\* Thursday, June 13th - Client Appreciation Picnic**  
Ironwood Farm  
455 Old Richardsville Road  
Bowling Green, KY 42101  
4:30pm - 7:30pm

**\*\* July 8 - 19 - Client Shredding Event**  
[See details on page 4](#)

# SO MUCH TO CELEBRATE!

There was so much to celebrate the last week at 446 East Main St! We had a ball with balloons, confetti, St.Patrick's Day feast, Toast of Baird, circus animals, plenty of laughter and so many new memories made!



We are incredibly proud to share that two of our colleagues, Shannon Vitale and Mac Jefferson, have recently been named 2024 Forbes Best-In-State Wealth Advisors\*. This prestigious recognition is a testament to their unwavering dedication, expertise, and commitment to excellence in the financial services industry.



Please join us in congratulating  
**Shannon Vitale**  
2024 Forbes Best in State Wealth  
Advisor



Discover the Baird Difference



Please join us in congratulating  
**Mac Jefferson CFA®, CWA®**  
2024 Forbes Best in State Wealth  
Advisor



Discover the Baird Difference

Please join us in congratulating Shannon and Mac on this well-deserved achievement. Our team members learn so much by working alongside these two incredible individuals each day.

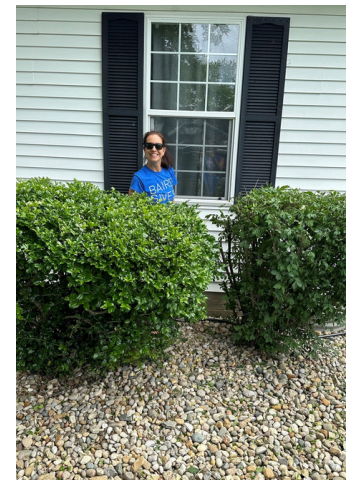
\*2024 Forbes/SHOOK Research Best-In-State Wealth Management Teams published 04/03/24, data as of 06/30/23

# baird gives back

ONE OF OUR FAVORITE WEEKS OF THE YEAR!!



Baird Bowling Green joined together with HOTEL INC to work on a home used for the Transition Housing Program to help individuals experiencing homelessness or living in West End of Bowling Green to overcome obstacles, connect with local resources and establish attainable goals for self-sufficiency. Visit [hotelincbg.com](http://hotelincbg.com) to learn more!



We had a blast helping out at The Foundry with their Field Day! We were able to act like kids with arts and crafts, reading books, eating popsicles and playing games. The Foundry's mission is to develop leaders among the children and young people of the West End of Bowling Green through education, health and fitness, and spiritual development. Visit [thefoundrybg.org](http://thefoundrybg.org) to learn more!



We recently hosted a client luncheon with one of our favorite Baird Market Strategist Michael Antonelli. He shared his insights on the markets during the election year. We have included the link to a summary of the event where he discusses this with another favorite Baird Market Strategist Ross Mayfield.

<https://youtu.be/shRmNGBa2Fo>

As another tax season came to a close, we showed some appreciation to our local tax professionals for their hard work and dedication. A huge thanks to Pastiche Provisions and Hickory & Oak for once again crafting amazing boards. We offer a complimentary Tax Return Review for our clients.

While Baird does not offer tax or legal advice, we regularly work with clients' attorneys and tax professionals to help ensure that all phases of wealth management are addressed. Please consult your legal or tax professional for specific information.



# SHREDDING EVENT



**JULY 8 - 19**  
**9AM - 4PM**

PLEASE FEEL FREE TO BRING YOUR  
IMPORTANT DOCUMENTS TO BE  
SECURELY SHREDDED  
AT OUR OFFICE.

**360 8TH AVE, SUITE 211**

**UPCOMING  
EVENTS**

To stay up to date with upcoming events click the link below:

<https://vitalegroup.bairdwealth.com/events>



**Visit us on Facebook:** <https://www.facebook.com/thevitalegroupatbaird/>