

The Schutz Perigo Group Quarterly Newsletter



Fall 2023 | Issue No. 3



Pictured left to right: Kim, Michelle, David, Felicia, John & Christina

John Schutz

Managing Director
Financial Advisor

David Perigo

Senior Vice President
Financial Advisor

Felicia Hostettler

Vice President
Associate Financial Advisor

Michelle Vanover

Senior Client Specialist

Kim Vollman

Client Specialist

Christina Scherry

Client Assistant

In This Issue:

Congratulations
David!

John - The Early
Days

Temporary Relocation
Updates

Renovation
Updates & Photos

Did You Know?

New to Baird
Online

Outside the Office

BAIRD

The Schutz Perigo Group
Private Wealth Management

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Robert W. Baird & Co. Incorporated

VK2023-0908

Congratulations David!

Forbes/SHOOK
Top Next-Gen
Wealth Advisor
Best In State
2023

A Forbes/SHOOK Top Next-Gen Wealth Advisor

David was recognized by Forbes/SHOOK as a 2023 Top Next-Gen Wealth Advisor Best In State. He was ranked #26 in the state of Indiana! Published 8/8/23, data as of 3/31/23. You can view the full list [here](#).



10 Year Anniversary!

David is also celebrating 10 years of being with Baird/Hilliard Lyons! What could be a better way to celebrate than getting recognized by Forbes/SHOOK for all your hard work these past 10 years? We are excited to see what he will accomplish in 10 more!

John - The Early Days

When moving to our temporary location, we stumbled upon some old photobooks that we wanted to share with everyone! We will continue to highlight these photos in our quarterly newsletters for you to enjoy.



Work outing 1992. We all received baseball jerseys with our rep numbers



My first office at Hilliard Lyons 1987



Hilliard Lyons Halloween Party 1987.



Hilliard Lyons Holiday party 1986



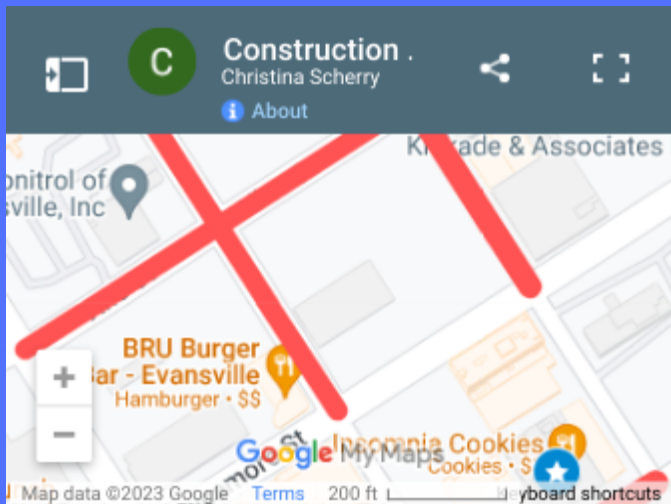
Hilliard Lyons Holiday party 1990. No way I was hiding my beautiful hair under a cowboy hat

Temporary Relocation Updates

We are still temporarily located on the **3rd floor** of the **Innovation Pointe building** at **318 Main St.**

Parking:

Construction has started on the 300 block of Main St to rebuild the driving lane. They will be replacing the brick with concrete and this is currently set to last until October 13th, when they will start working on the 200 block. This will affect street parking in front of our temporary location, but street parking will still be available on the 200 block and most side streets. See the map below to view current road closings downtown due to construction. Click on the map to view in your browser.



Renovation Updates

Renovations are still underway at 110 Main St! Here are a few things that have happened since June:

- All framing complete
- 2nd floor painting & flooring complete
- 2nd floor ceilings & lighting near complete
- 2nd floor window shades near complete
- 1st floor ceiling grid install complete
- 1st floor above ceiling electrical near complete

When are you moving back in?

Due to labor shortages, our estimated move in date has been changed to mid/late October 2023. This is still subject to change, but we will keep you updated as we know more.

Want More Renovation Updates?



[Click here](#) to follow us on Facebook and see the latest updates as they happen!

Renovation Updates - Photo Timeline



2nd floor with new concrete deck



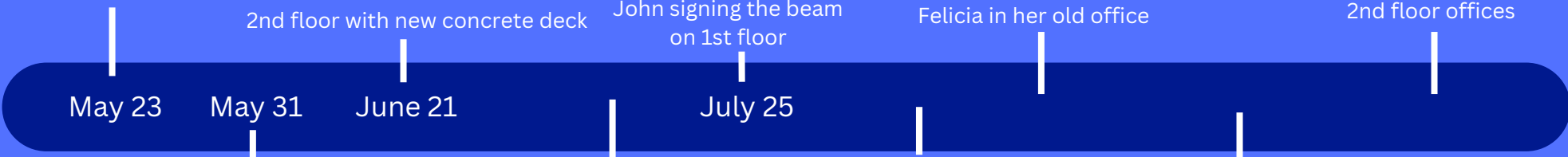
John signing the beam on 1st floor



Felicia in her old office



2nd floor offices



May 23

May 31

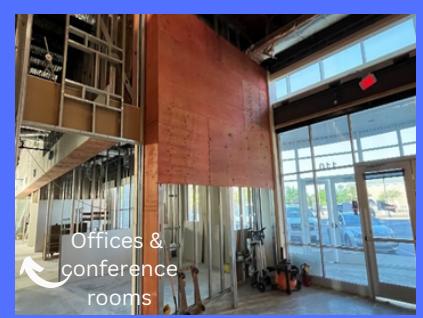
June 21

July 25

August 6



1st floor



Offices & conference rooms

1st floor



Felicia at the beam signing



1st floor view from the Mezzanine

Large 1st floor conference room



2nd floor



2nd floor conference room



2nd floor bathroom



1st floor

Did You Know??



New to Baird Online:



Our Hilliard Lyons email addresses no longer work! If you have these old emails simply replace “@hilliard.com” with “@rwbaird.com”

“Taylor Swift's Eras concert tour could generate \$4.6 billion in economic activity in North America alone, taking into account stadium capacity and reported spending on tickets, merchandise, and travel. That would be roughly on par, after adjusting for inflation, with the revenues the Beijing Olympics generated in 2008.” - [The New York Times, Aug 13, 2023](#)



Quarterly tax estimates are due in the mail by September 15th, 2023!

“On average, those who gave a number, believe they need about \$1.27 million to retire comfortably, however, the average respondent who shared their retirement savings had just \$89,300 in the bank, their 401(k), or other accounts.” - [Business Insider, June 25, 2023](#)



The IRS announced a new notice that will continue to allow higher-income participants age 50 and over to make pretax catch-up contributions through 2025. This will apply to those who participate in “401(k) and similar retirement plans.” - [IRS Newsroom, August 25, 2023](#)



“The U.S. today accounts for 58% of the output of the G-7 group of leading nations, compared to 40% in 1990. Investors who put \$100 into the S&P 500 in 1990 would have more than \$2,000 today, four times what they would have earned had they invested elsewhere in the rich world. Incomes for the country’s poorest fifth have risen in real terms by 74% since 1990” - [The Economist, April 13, 2023](#)



Mobile Check Deposit: Conveniently make deposits to your account by submitting check images within the Baird Online mobile app. This feature only works with the mobile app.

ACH In Transfer Request: View existing and initiate new ACH instructions. Available for mobile app and web version.

Security:
Your deposits and requests are backed by Baird Online’s advanced multi-factor authentication.

24/7 Convenience:
Make your deposits and transfers on your own schedule. No need to visit the branch.

Active Tracker & History:
See where your money is in the transfer process and get notified of when it’s in your account. Access a history of past deposits and transfers.

FAQ’s:

Q: What if I don’t have Baird Online?

A: We will still be able to assist you with these services as we always have. The new features are for those who wish to use them, it is not required. You can sign up for Baird Online by clicking [here](#).

Q: Are there minimums or limits I should be aware of?

A: The minimum for deposits & transfers is \$0.01 and the maximum is \$250,000

Q: Do I need to let you know I’m making a deposit/transfer?

A: You do not. Our team will get an email upon completion of the deposit/transfer and we will contact you if we have any questions.

Q: Can I use the deposit/transfer feature on all my Baird accounts?

A: These new features are not available for any IRA or Trust account.

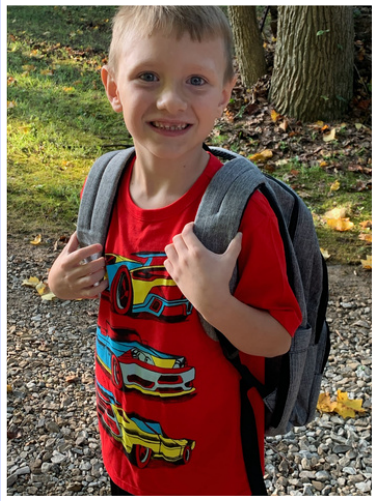
How To Use
Mobile Deposit

Baird Online App
Download for iPhone

How To Transfer In & Add
New Bank Account

Baird Online App
Download for Android

1st Day of School!



Kim's grandson, Logan



Kim's granddaughter, Lucy



Kim's granddaughter, Lila



Kim's granddaughter,
Laina



Kim's granddaughter, Chloe



David's daughter, Rosalie



Christina's son, Camden

Outside the Office



John on his fishing trip in Canada. He caught a 41 inch Muskie!



John with his family celebrating birthdays.



John and his wife, Cindy, at the Perry Park couple's golf outing.



David & Rosalie at her Preschool graduation.



David at the Eiffel Tower in Paris, France.



David and his friend, Jon, at a Notre Dame game in Dublin, Ireland.



David in London, in front of Big Ben!



David inside the Colosseum in Rome, Italy.

Outside the Office



Christina's husband, Kellan, helping Camden blow out his birthday candles!



Christina and Camden at Holiday World.



Camden "driving" one of the car rides at Holiday World.



Camden ready for a big day on the lake.



Camden after his big day on the lake.



Sign on the West Side showing Michelle's son, Tyler, as the Mater Dei football player of the week!



Michelle and her neighbors enjoying some weekend Karaoke.



Michelle with family and friends celebrating a nice, long Memorial Day weekend.

Outside the Office



Michelle with her husband, Scott, and sons, Austin & Tyler, on vacation in the Dominican Republic.



Kim's grandson, Logan, on the beach in Pensacola.



Felicia's husband, Byron, with their granddaughter, Nelli, at gymnastics in California.



Felicia, Byron with Nelli on their California visit.



Felicia helping Nelli with her gymnastics.



Nelli enjoying another day on the beach!



Felicia and Bryon at New Brighton Beach on their vacation to California.



We couldn't pick which Nelli picture was cuter, so we had to add this one too!

Follow us on Social Media!



The Schutz Perigo Group - Baird Private Wealth Management

The Schutz Perigo Group - Baird Private Wealth Management, Evansville, Indiana.

 facebook.com

LinkedIn



John L. Schutz

Forbes "Best-In-State" Wealth Advisor
2021, 2022 & 2023; Barron's Ranked
Advisor 2021, 2022 & 2023

Baird | University of Pennsylvania - The Wharton School

[View profile](#)

LinkedIn



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Senior Vice President | Financial
Advisor at Robert W. Baird & Co.

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