

The Schutz Perigo Group Quarterly Newsletter

Spring 2023 | Issue No. 1



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

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Michelle!**

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Inevitable Wealth**

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BAIRD

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Robert W. Baird & Co. Incorporated

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Congratulations David & Felicia on Their new Officer Titles!



Because of their significant contributions to the company, David & Felicia have earned new officer titles! David has been promoted to Senior Vice President and Felicia has been promoted to Vice President! This is the result of all of their dedication to strategic planning and outstanding customer service. We couldn't be more proud to have them on our team!



Congratulations Michelle on 25 years!

Michelle started with us in June of 2007 and the knowledge she has gained from her experience is irreplaceable in helping our clients. When asked to comment on her 25 years she replied, "Has it already been that long?" When you enjoy what you do, your team and the clients you work with, time flies.

25 YEARS



Temporary Relocation

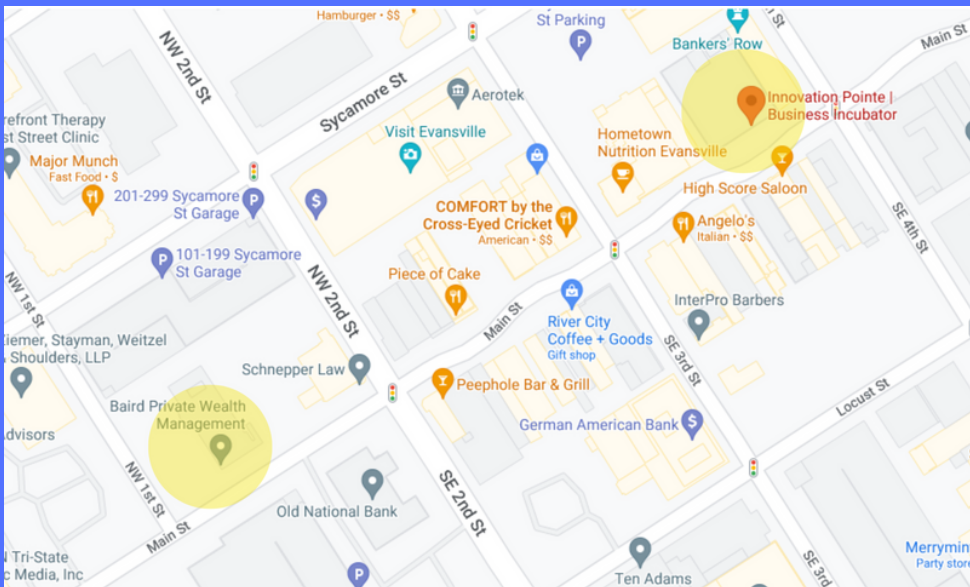
We are excited to announce that our entire downtown office will be undergoing a complete renovation starting Friday, March 10th!

We will be temporarily located on the **3rd floor** of the **Innovation Pointe building at 318 Main St.** This location is just a couple of blocks away from our current location and will allow us to continue our day to day operations without any interruptions.

This renovation will allow us the space to further grow our team to service you.



[Click here](#) to follow us on Facebook and see the latest updates on our renovation!



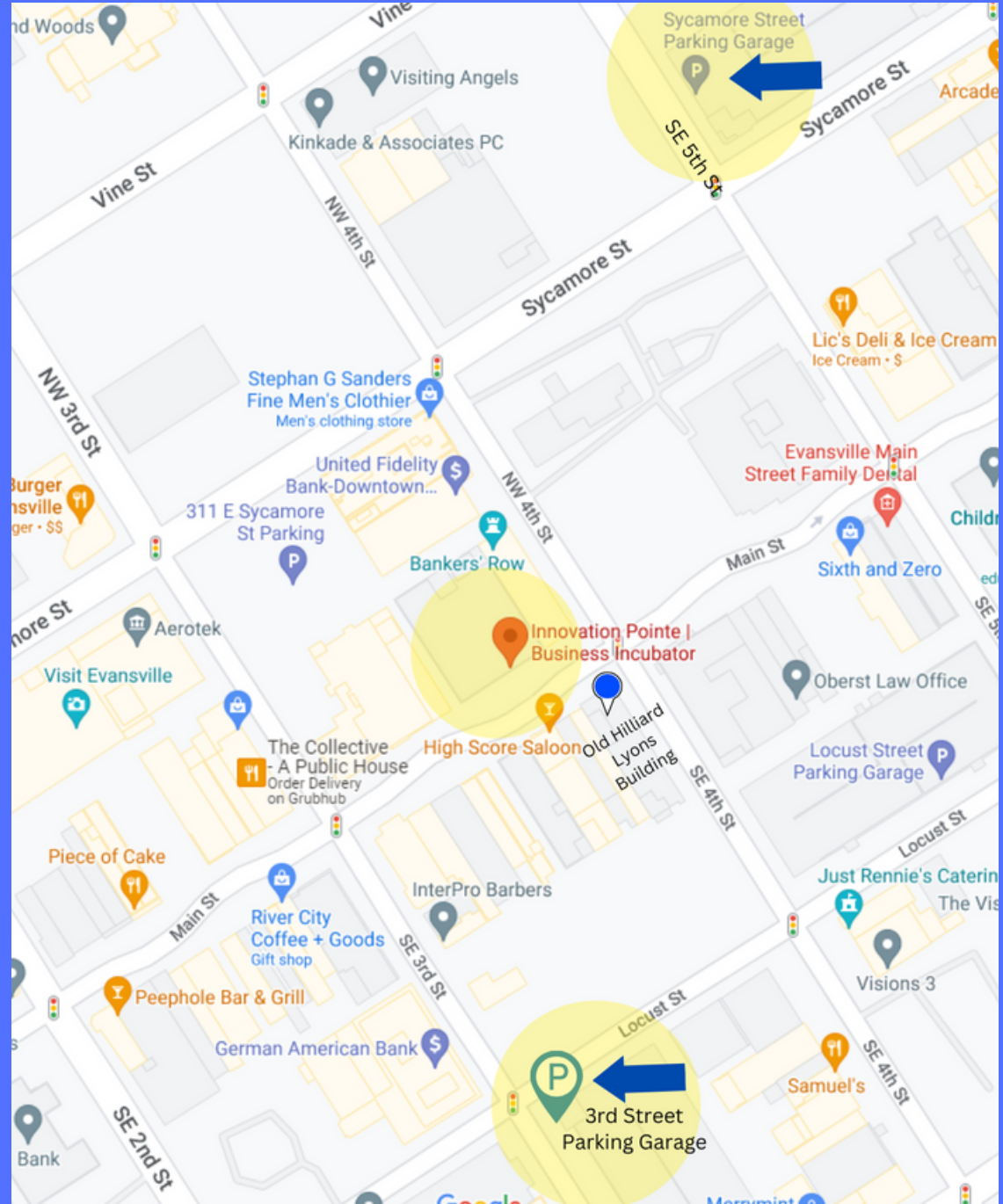
Frequently Asked Questions:

- Where is it located?
 - 318 Main St. on the 3rd floor. Location is across from the old Hilliard Lyons building.
- Where can I park?
 - There are a couple of options for you, all of which are listed in detail on the next page.
- Will this affect my meeting with my advisor?
 - It will not, the new location will have meeting rooms allowing you to meet with your advisor as you always have.
- How long will you be there?
 - We are told this will take approximately 6 months. However, this is not a guaranteed time frame and we will keep you updated as we know more.
- How will we contact you?
 - All of our business phone numbers will remain the same. We have mail forwarding set up to our PO box, so you do not need to worry about mailing to a new address.
- What if I need to drop things off or pick something up from you?
 - You will still be able to drop off/pick up any paperwork as you always have. Please call us ahead of time so we know when to expect you.
- What about my other concerns?
 - If you have any other concerns, please call us and we would be happy to address them for you.

Temporary Relocation Parking

Parking Options:

- Street parking along Main Street and all side streets is open but subject to availability.
- Please note that most Main Street parking has a 2 hour maximum and this is highly regulated.
- Sycamore Street Parking Garage located on the corner of 5th & Sycamore will be available. Entry to the garage is on 5th Street. Bring us your parking ticket so that we can validate for you.
- 3rd Street Parking Garage located on the corner of 3rd Street & Locust Street will be available. Entry to the garage is on Locust Street. Bring us your parking ticket so that we can validate for you.
- Other parking garages are available, however, we will not be able to validate parking for any garage not listed above.



Did You Know??

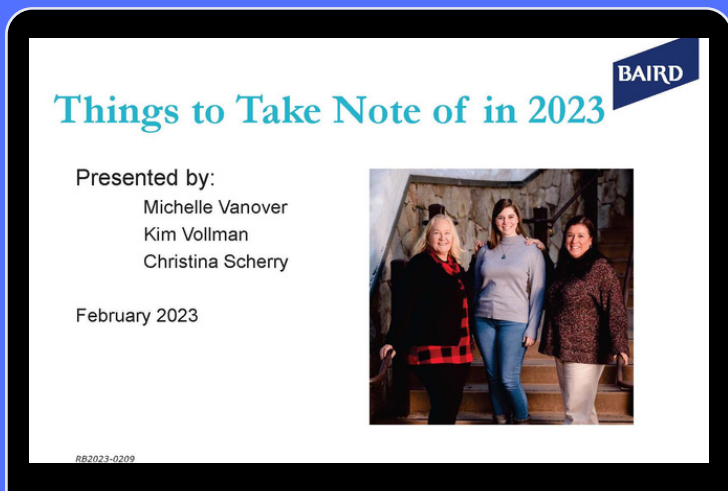
Important Changes

Contributions for IRAs, Roth IRAs & 529s have increased for 2023. They have also changed the age at which required minimum distributions (RMDs) need to be taken. There are several factors that determine how these changes may effect you. There is also a **potential** change for how RMDs will be handled for inherited IRAs.

All of This and More is Covered in Our Latest Video!

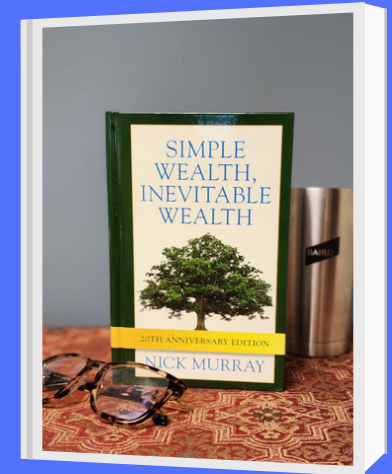
We know it's hard to keep up with all of the changes, so we have put together a short 12 minute video covering the details of all the changes listed above, and more!

Click the image below to be directed to our video "Things to Note for 2023"



Simple Wealth, Inevitable Wealth

We find that this Nick Murray book, *Simple Wealth, Inevitable Wealth*, is very well written and addresses issues of significance to those serious about retirement and wealth accumulation.



As you are likely aware, tumultuous markets like we have experienced over the past year may prompt investors to do the wrong thing at the wrong time. Unfortunately, strategies based upon emotional responses to markets and global events can be a recipe for disaster. We believe this book can provide investors of any age or knowledge level with the necessary perspective and optimism about the future.

We have some extra copies available to loan to anyone wanting to add this to their reading list. If you are interested in borrowing a copy please email theschutzperigogroup@rwbaird.com or call 812-426-1481 and request that a copy be mailed to you.

Outside the Office



Michelle's son Austin after being awarded the heavyweight wrestling champion in Brentwood, TN.



Michelle's sons Tyler & Austin at the national honors society induction at Mater Dei.



Christina & her husband, Kellan in front of Cinderella's castle at Magic Kingdom.



Christina, Kellan and their son Camden on the Toy Story Mania ride in Hollywood Studios at Disney World.



Christina's son, Camden meeting Goofy at Disney World.



Christina & Kellan at Title Town in Green Bay, WI.



Don't let the candles fool you, Kim's granddaughter Lila just turned 13!



Kim's grandson Logan at the lighthouse parade where he placed in the top 5!

Outside the Office



Felicia, her husband Byron, their kids Devan & Cody, daughter-in-law Marissa and grandbaby Nelli at Christmas in California.



Felicia's granddaughter Nelli living her best life on vacation in Hawaii sipping on a coconut.



David & his daughter Rosalie at the USI pregame party before the USI OVC Tournament game.



John with his two favorite assistants at his Florida home office.



John with the Evansville OVC Organizing Committee members. Each year the OVC earns the first entrant into the NCAA March Madness tournaments for both men and women.



Fireworks in front of Cinderella's castle at Disney World.