

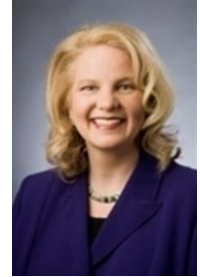


4th Quarter 2023

What We're Talking About this Quarter?

All That Matters: Summer's Over. What Matters Now?

What are "rates" and what are they doing? Is the economy doing as poorly as the news suggest? In this episode of All That Matters, Mike and Ross cover what investors should be paying attention to as we ramp up into year end. Use the link [here](#) to review the article.

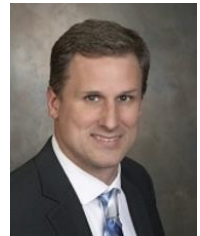


Shannon Davidson
Financial Advisor
sdavidson@rwbaird.com



Baird Trust: How We Serve Families

For nearly 40 years, Baird Trust has helped high-net-worth individuals and institutions ensure their legacies across generations and through changing market cycles. We offer services such as asset management, estate planning, wealth transfer, tax planning and trust services to clients throughout the United States. Use the link [here](#) for a more in depth view of Baird Trust.



David Knaack
Financial Advisor
dknaack@rwbaird.com



Strategies for Estimated Tax Payments

If your income is unexpectedly spiking, you may need to make estimated quarterly tax payments this year. These strategies can help you minimize your tax bite. Use the link [here](#) to review the article.



Sean Mahlik
Client Specialist
smahlik@rwbaird.com



Give the Gift of Stock

Given the recent increases in the standard deduction, many people have become more creative in trying to get the maximal impact from their charitable contributions. Donating appreciated assets, such as stock, can have tremendous advantages, but the rules around these things can be complicated. Here's what you need to know about donating different types of assets. Use the link [here](#) to review the article.

Top Winter Destinations 2023

Whether getting ideas for future trips or remembering adventures you've had in the past, we invite you to explore the amazing destinations featured in this piece. Use the link [here](#) to view Travel + Leisure's top winter destinations of 2023.

The Davidson Knaack Group

Baird
One S. Pinckney St.
Suite 600
Madison, WI 53703

Phone: 608-252-5736
Toll Free: 800-937-8625

What's Happening in the Markets?

Market Strategy

by STRATEGAS A BAIRD COMPANY

STRATEGAS provides market strategy and timely perspective to help you better understand what is happening in the world today and what it means for your portfolio and plans. See STRATEGAS' Market Strategy Weekly video as well as other market insights [right here](#).

Baird Wealth Strategies



Live Webinars by Baird Experts

Baird Wealth Strategies is a program that offers live education and insights on timely wealth management topics. We have an archive of past presentations covering things such as education planning, and business transitioning. Be sure to catch the replays of these presentations, and registration for upcoming webinar's [here](#).

What Else is Going On?

Baird Online & 360 Wealth

Baird Online, the client-exclusive area of our website, is available free to our Baird clients. Baird Online provides detailed, real-time account information, 24 hours a day seven days a week. Using the latest Internet technology, Baird Online offers real-time market information, as well as educational and market tools such as market news, U.S. market commentaries, mutual fund data, a stock watch, stock-finding tools, and portfolio tracking. Use this [demo site](#) to get a feel for the power of Baird Online & 360 Wealth.



Baird – [Nationally recognized as a great place to work since 2004.](#)

If you do not wish to receive further Baird email announcements, reply to this email with "Remove Me" in the subject line.

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