



1st Quarter 2023

What We're Talking About this Quarter?

In the Markets Now: Heading into the New Year

We believe in the old saying: a picture is worth a thousand words—but this time we're going with a list of noteworthy numbers as we aim to provide some perspective to investors. Use the link [here](#) to review the article.

Highlights of Secure 2.0 Act

Delayed RMDs, increased contribution limits, new savings options and more highlight the latest efforts to enhance retirement savings. Meanwhile, many other anticipated changes were left out. Use the link [here](#) to review the article

What the Inflation Reduction Act Means to You

Much of the headline news accompanying the Inflation Reduction Act of 2022, which was signed into law by President Biden in August, focused on beefing up the IRS to the tune of \$80 billion. But the provisions dedicated to such things as clean energy incentives and reducing healthcare costs deserve attention as well – as do some much-discussed items that didn't make the final bill. Use the link [here](#) to review the article.

2022 & 2023 Tax Facts Cheat Sheets

Please feel free to make use of these handy cheat sheets as you all prepare for last year's tax filing and to plan for this year's new tax parameters.

[2022 Tax Facts](#)

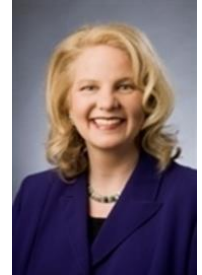
[2023 Tax Facts](#)

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](#).



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What Else is Going On?

Baird Online & 360 Wealth

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