

The Schutz Perigo Group Quarterly Newsletter



Summer 2023 | Issue No. 2



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
John!**

Felicia in the 90's

**Temporary Relocation
Updates**

**Renovation
Updates & Photos**

Did You Know?

Around the Office

**Baird Gives Back
Volunteer Day**

Outside the Office

BAIRD

The Schutz Perigo Group
Private Wealth Management

110 Main Street
Evansville, IN 47708
812.426.1481 | 888.426.1481
theschutzperigogroup@rwbaird.com

Robert W. Baird & Co. Incorporated

JG2023-0608

Congratulations John!

A Barron's
Top 1,200
Advisor 2023

Baird Top 20
Producer
2022

A Forbes Best
In State
Wealth
Advisor 2023

A Barron's Top 1,200 Advisor

John was recognized by Barron's as a 2023 Top 1,200 Advisor nationally. He was one of 18 advisors recognized from Indiana and is celebrating his 3rd consecutive year on the list! Published 3/10/23, data as of 9/30/22. You can view the full list [here](#).



A Forbes Best In State Advisor

John was also recognized by Shook Research as a 2023 Forbes Best In State Wealth Advisor. He ranked #14 in the state of Indiana. John is celebrating his 3rd consecutive year on the list! Published 4/4/23, data as of 6/30/22. You can view the full list [here](#).

A Baird Top 20 Producer

John was also recognized as a Baird Top 20 Producer for 2022. He was ranked #7 out of over 1,300 Baird advisors nationwide.

Felicia in the 90's

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.

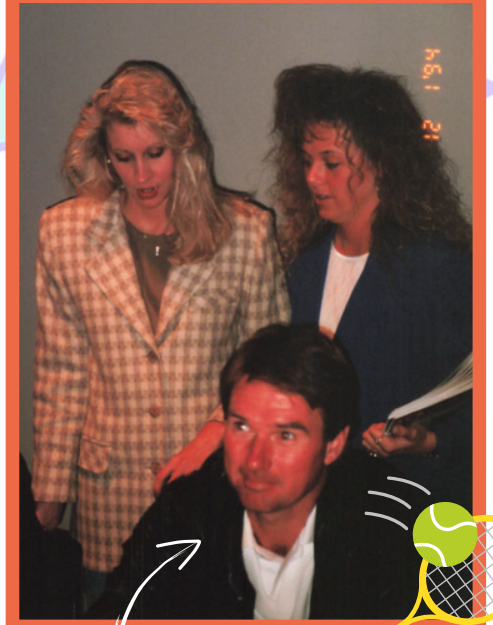


New hire at Hilliard Lyons
Fall 1992



My work desk! I have my own computer and my trusty typewriter.
September 1994.

I still have this stapler from 1992!



Jimmy Connors before the Hilliard Lyons Tennis Classic at Robert's Stadium. December 1994



Me with my coworkers!
John sure is a "bone head"



Hilliard Lyons client event. July 1997



Temporary Relocation Updates

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

We have been able to easily adjust to our new building, and we appreciate your patience as we have been learning our new phone system and working out the issues.

PLEASE NOTE:

We are having problems with mail being forwarded correctly. If you need to mail us anything, please send to:

The Schutz Perigo Group of Baird
PO Box 98
Evansville, IN 47701

Parking:

We know this was a concern for a lot of our clients and we have not had any complaints about not being able to find parking downtown. Most have been able to park right outside the door on Main Street while others have used the parking garages.

If you have a sweet tooth:

Our temporary location is right next to Insomnia Cookies. We have all decided this is a major perk of the temporary move!

Renovation Updates

Things are moving quickly over at 110 Main Street! Here are some of the highlights of what has been accomplished so far:

- Demo is 100% complete including HVAC and most plumbing
- Floor leveling complete
- Layout for new plumbing started
- HVAC rough ins started
- Wall framing on 1st & 2nd floors started
- Electrical rough ins started
- Additional sign added to front of building
- Concrete deck on second floor has been poured and second floor is completely filled in
- More natural light is filling the space

When are you moving back in?

As of now, we are on target to move back in early/mid September 2023. This is 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



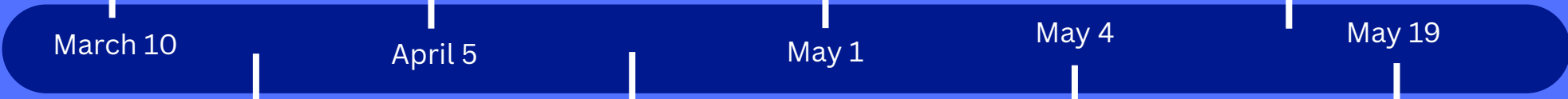
1st floor offices



John & Felicia's old offices
2nd floor



2nd floor decking for expansion



March 10

April 5

May 1

May 4

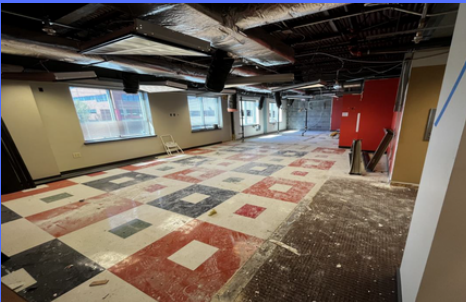
May 19

Lunch room on Mezzanine floor

1st floor offices

New sign added to front of building

Prep for 2nd floor concrete deck



May 23

2nd floor concrete deck

1st floor Main Street side

1st floor & Mezzanine floor

2nd floor future corner conference room



Did You Know??



Many changes to individual income taxes in the Tax Cuts and Jobs Act of 2017 are scheduled to 'sunset' at the end of 2025 unless additional congressional action is taken. This could mean tax increases for many individuals. 2026 will be here soon!

Indiana's 20% maximum tax credit for 529 contributions has been increased from \$1,000 to \$1,500 (meaning you can now get a 20% credit on contributions up to \$7,500 in 2023).

Medicare Part B and Part D premiums are based on your income from 2 years ago.

We are working on a new Schutz Perigo Group educational video discussing healthcare options before & after age 65!

Baird Online

Baird Online can now be used to send secure documents, such as tax returns, to our group! You can also view your Baird accounts and statements before they arrive in the mail.

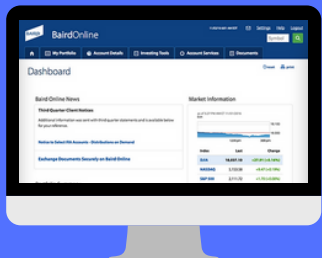
They have made registering for Baird Online as easy as possible. Don't worry, for those of you that would like some extra guidance, you can click on the buttons below.

Register Online

Video of How to Register Online

How to use Secure Document Exchange

How to Download Baird Online App



Around the Office



John, David & Felicia had the pleasure of hearing Chief Economist Brian Wesbury speak at a luncheon hosted by First Trust in May. Brian spoke about the current economic state and his thoughts on where things are headed.

Brian has been a valuable resource to our team and clients throughout the years and they enjoyed hearing him speak in person again.



John giving an impromptu speech on the process of transitioning to Baird to some fellow associates in Wisconsin. He is always happy to share his experiences to help out others.

Felicia on her birthday in March! She was thrilled to add some balloons and a flower to brighten up her temporary work space.

Not pictured is John on his birthday in May. Felicia made us all banana pudding to celebrate!



Baird Gives Back Day - CMOE



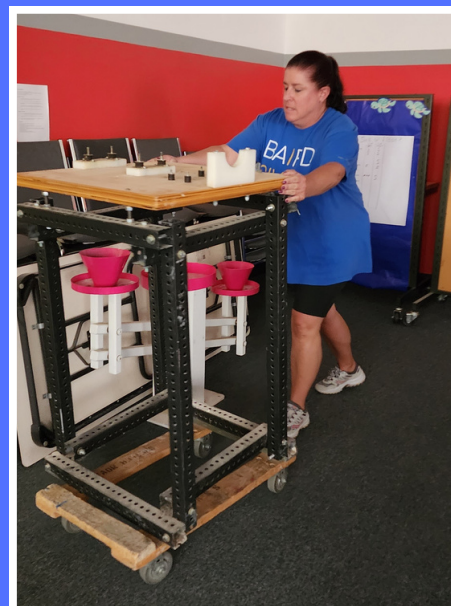
In May, several of us got together to give back to our community. Collectively, we spent two days at CMOE downtown helping clean and organize for their upcoming Summer activities. There was heavy lifting, scrubbing, sorting, sweeping, rearranging, assembling of new toys and some Baird office bonding. We are grateful to work for a company that gives us the time to give back!

BAIRD
GIVES
BACK



Did you know you can donate items to CMOE that you would normally throw away? If interested, [click here](#) to view their wish list.

Looking for a fun, air conditioned Summer activity to do with the kids or grandkids? [Click here](#) to view CMOE's event calendar.



Easter & Graduation



Kim's granddaughter, Luna, on her egg hunt!



Luna enjoying her Easter lunch.



Christina's son, Camden, on the hunt.



Camden enjoying dying Easter eggs. He thinks the Easter bunny lays the eggs.



Kim's grandson, Logan, at his Kindergarten graduation.



Kim's grandson, Luke, graduating from 5th Grade



Michelle and her family for Austin's graduation from Mater Dei.



Austin at his graduation party. On to Western Kentucky University!

Outside the Office



Michelle's husband, Scott, and son, Tyler, on Spring break in Mexico.



David's daughter, Rosalie, in her dance recital costume.



David & Rosalie after her t-ball game.



Rosalie at school for Space Day!



John and his granddaughter, Ayden, at her honor band concert.



Ayden before her honor choir concert. She had the biggest smile the whole time!



John and Cindy out on the town.



Kim's grandson, Logan, fishing. He caught around 30 bluegill that day!

Outside the Office



Kim's granddaughter, Laina, hanging out on the mini horse.



Felicia and Byron camping at Pounds Hollow.



Felicia's family at the Zoo feeding the giraffe!



Felicia's granddaughter, Nelli, enjoying sand in her toes and in her mouth.



Camden going for a ride in his Mini Cooper down the halls of Helfrich Park.



Camden enjoying two popsicles (grandma gave hers up).



Camden enjoying the lake on Memorial Day weekend. The water was a little cold.



Christina with Camden and her nephew out on the boat for Memorial Day weekend.