

# Where Values Drive Wealth

Retire Well/ Impact Investing/ Women & Wealth

BAIRD

Private Wealth  
Management

January 2018

## You're Invited!

### Financial Planning: The Tax Cuts & Jobs Act

You're invited to join us for this exclusive webinar with Director of Advanced Planning, Tim Steffen, who will discuss the final bill that came out of Washington and how it impacts the following: Your income tax situation, estate planning, education funding, investment planning, and more.

The Webinar will take place:

- **Wednesday, January 17, 2018**
- Noon – 1PM Central Time
- [REGISTER HERE](#)

Past presentations are available on [the Baird Wealth Strategies webpage](#) to review at any time, along with information on the upcoming presentation topic.

## Wealth Management Insights

### Highlights of the Final Tax Cuts and Jobs Act

The Tax Cuts and Jobs Act bill includes tax rate cuts for individuals, corporations and pass-through businesses, an elimination of many forms of tax deductions, larger exemptions from the estate tax and Alternative Minimum Tax (AMT), and numerous changes affecting multi-national businesses

[Read more on the Final Tax Cuts and Jobs Act here.](#)

### Aligning Social Objectives with Financial Goals

Responsible investing carries many different titles but the goal remains the same, create a more equitable world by leveraging nonfinancial factors such as social issues, environmental problems, and corporate policy with the economic goals of investors.

[Read more on balancing social objectives with financial goals here.](#)

Don't forget to visit my website for more information on events and market updates! [Mary-strickland.com](#)

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## 2018 Investment Strategy Outlook

**Economy:** Global growth trends remain high and the cyclical bull market approaches maturity heading into mid-terms.

**Fed Policy:** Yields at the long end of the Treasury curve remain low while the Fed's inflation gauge is going towards 3% for the first time in a decade. Fed Reserve Board changes from Janet Yellen to Jerome Powell as Chair.

**Sentiment:** Bullish. Volatility rising.

[Read more in Baird's 2018 Economic Outlook](#)