



# The Jester Group Newsletter

## First Quarter 2020



### Resources and Readings

- Wealth Strategies Call: [Medicare with Richard Braun](#)

*Please join us as Baird's Financial Planner Richard Braun discusses the costs and benefits of Medicare plans, as well as how to enroll. You will also learn more about how you can get the most out of your coverage and which choices make financial sense for you.*

- Financial Planning: [Taking Advantage of the SECURE Act](#)

*As of the beginning of 2020, the Setting Every Community Up for Retirement Enhancement (SECURE) Act has become law, with the potential to enhance your retirement prospects in a variety of areas. Most significant are the changes to Individual Retirement Accounts (IRAs), which could help many older Americans save even more for retirement. But there are also some retirement benefits that have been lost. Here are some of the highlights of the new rules, and what you can do to take advantage of them*

- The Markets and Investing: [2020 Market and Wealth Management Outlook](#)

*Kathy Carey, CFA®, Baird's Director of Investment Research and Advanced Planning, shares Baird's 2020 outlook and the steps you can take to feel confident about your financial plan.*

- On Sustainable and Responsible Investing: [White Paper on Aligning Social Objectives with Financial Goals](#)

*This paper seeks to introduce the responsible investing landscape and outline how responsible investing has become increasingly ingrained in today's portfolio management process.*

- Next Gen: [How to Cover the Cost of Your Wedding](#)

*The average American wedding costs about \$30,000 these days; about the same as a down payment on a house. If you and your spouse-to-be are getting cold feet from the prospect of managing that bill yourself, you have two choices: spend less or save more. Here are some practical tips to help you do both.*

### Jester Group News and Insights

- Gene Jester recognized by [FORBES as a Best-In-State Advisor 2020](#)
- Featured Sponsorships: [Chatham Arts Council](#)
- Now, you can find us on [Facebook!](#) Please visit our new page.

## Upcoming Dates

Date	Event
2/17	Markets Closed for President's Day
2/18	Majority of Baird Tax Statements Mailed by this date (All documents received by 3/16)
4/10	Markets Closed for Good Friday
5/25	Markets Closed for Memorial Day
7/3	Markets Closed for Observance of July 4 Holiday
TBD	Shredding Event TBD after Tax Season

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