



The Paulson Group
Private Wealth Management

BAIRD

March 2019



*The **SWAN** method of investing*

Quality investments that you understand allowing you to
Sleep Well At Night.

Peace of mind through thoughtful planning and execution.



Wealth Management Insights

When making plans for life in retirement, many people immediately think about leisure activities like travel, golf or sailing. However, depending on your circumstances, your retirement can last 30 years or longer, and the things you like to do when you first leave the workforce might be vastly different than in your later years. This month's Wealth Management Insights revisits the three phases of retirement and how you can prepare – mentally and financially – for each.

[Click Here to Learn More](#)



2018 Tax Traps-There Are Some

The 2018 tax forms look different, seem shorter and more condensed. That doesn't mean there's less information to provide the IRS.

The "look" of the forms is only the beginning. For those DIYers (do-it-yourself-ers) this year's tax preparation could be confusing and complex.

Look here for Baird experts to help.

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How Tax Changes May Impact Retirees

Spring brings the start of baseball season and our dreaded tax season. With recent tax changes, this year's tax filling is a whole new ball game.

Many retirees are carrying debt into their retirement years including credit card debt and remaining mortgages. Here to help retirees, is Baird's Director of Advanced Planning, Tim Steffen, to fill you in on how recent tax changes may affect pre-retirees and retirees.

[Click Here to Learn More](#)

Contact Us

The Paulson Group

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Visit our website

While no portfolio is immune to market volatility the Paulson Group will work with you to create and monitor a portfolio specifically designed for you. Past performance is not a guarantee of future results.

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Out and About

*Thank Goodness Its Friday Networking-TGIFN

8:00 am-9:00 am

2nd and 4th Friday each month

ABeanToGo

16 West Flint Street, Lake Orion

Open business networking –ALL INVITED

*Trailblazers Group-Bloomfield Birmingham Chamber of
Commerce

8:00 am to 9:00 am

1st and 3rd Tuesday each month

Baird Birmingham Branch

300 Park Street, Suite 240, Birmingham

Contact Al Hassinger-248-594-9959