



The Rosenberg Group

Private Wealth Management

BAIRD

July 2016 Newsletter

Featured Articles

- Independence Day
- Developing a Financial Plan at Each Life Stage
- The Woodward Dream Cruise

Our Team

The Rosenberg Group has over 40 years of combined experience in wealth management and financial services. With a special combination of practical experience and analytical capabilities, our clients feel secure that their unique needs will be met through our wealth management process. We work with successful individuals, families, businesses and their owners.

Understanding the needs of such multigenerational businesses and families comes naturally to us, because we are one. And we measure our success by our clients' satisfaction.



Sheldon Rosenberg
Managing Director

connect via **LinkedIn**

Independence Day

One Fourth of July, a young boy climbed into his boat, secured his life jacket and rigged the sail. Alone he pushed off from the dock out onto the lake, diligently working his boat into the wind and making his way further from shore. It was then, for the first time in his life, that he experienced the joy of independence.

Such moments are rites of passage in life. We all experience them. For some it may be that first solo sail. For others it might be learning to ride a bike or, better yet, getting a driver's license. The common denominator is the realization that we are in control of our direction and our lives.

Financial independence carries the same connotations. Whether it's realizing you can comfortably retire or finding that you now have the freedom to pursue your passions, it brings a rush of confidence, happiness and fulfillment. And just as most of us had an instructor to show us how to drive, The Rosenberg Group can help create the framework and a plan for working toward your own financial independence.

Announcements

From all of us at Baird, we wish you and your family a Happy Independence Day! The stock market and our office will be closed on Monday, July 4, in observance of Independence Day.



Developing a Financial Plan at Each Life Stage

Baird Senior Estate Planner, Rick Holman, recently sat down to discuss some of the key topics involved in developing a personalized financial and estate plan, including:

- Recognizing financial issues that arise through the years
- General ideas for addressing financial decisions
- Balancing different – and occasionally competing – financial objectives



Listen to the recording [here!](#)



Jordan Rosenberg
Financial Advisor

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Upcoming Event



Cruise on by for our "early" celebration of The Woodward Dream Cruise!

Join us for refreshments, food and a terrific view of this year's event.

Thursday, August 18, 2016

5:00 – 8:00 p.m.

Baird

300 Park Street, Suite 240
Birmingham, MI 48009

Please bring your own lawn chair. We will be seated on the front lawn facing Woodward Avenue.

Hosted by:

Baird's Birmingham branch

R.S.V.P. to Katie McAuliffe at 248-594-9959 or kmcauliffe@rwbaird.com by Wednesday, August 3. Space is limited. Reservations will be granted on a first come, first serve basis.

Children welcome!