

Baird Online – Registering is Easy!

Getting Started:

Click on the link provided in the Baird Online registration email, or visit <https://bol.rwbaird.com/Register>.

1. Enter your Personal Information associated with your account. An email confirmation will be sent to the email address entered.

The screenshot shows the BairdOnline registration interface. At the top, the Baird logo and 'BairdOnline' are displayed. Below is a progress bar with four steps: 'ENTER PERSONAL INFORMATION' (active), 'EMAIL ADDRESS VERIFICATION', 'SET USER ID, PASSWORD AND SECURITY QUESTIONS', and 'WELCOME!'. The 'Enter Personal Information' form includes fields for First Name, Last Name, Zip Code, Social Security Number (with a 'Show' button), Date of Birth, and E-mail Address. A green 'CONTINUE' button is at the bottom left. A yellow callout box on the right asks for help with online registration and provides a 'Click here' link.

The screenshot shows the BairdOnline registration interface at the 'Email Address Verification' step. The progress bar indicates that the first step is complete. A green notification box states: 'An email confirmation has been sent to: dlewis@rwbaird.com'. Below this, a yellow box instructs the user to check their email for a verification link, valid for 24 hours. On the right, a 'Help and Troubleshooting' section provides instructions on checking spam folders and contact information for online support (888-212-8863) or phone support (Monday-Friday, 7:00 a.m. to 6:00 p.m. CT).

2. Click on the link in the email confirmation to continue the Baird Online registration process.



Baird Online – Registering is Easy!, *continued*

3. Continue creating your User ID and Password, Security Questions, Telephone Number and eDelivery Preferences

Register Online

ENTER PERSONAL INFORMATION | EMAIL ADDRESS VERIFICATION | SET USER ID AND PASSWORD | SET SECURITY QUESTIONS AND PHONE NUMBERS

First Name (Required)

Last Name (Required)

Zip Code (Required)

Social Security Number (Required) [Done]

Date of Birth (Required) mm/dd/yyyy

E-mail Address (Required)

CONTINUE

Need help with Online Registration? Choose either [video](#) or [pdf](#) instructions.

Create Login

ENTER PERSONAL INFORMATION | EMAIL ADDRESS VERIFICATION | SET USER ID AND PASSWORD | SET SECURITY QUESTIONS AND PHONE NUMBERS

User ID (Required)

- Between 6 and 20 characters
- Can be letters, numbers and/or symbols in any combination
- May not contain spaces

Password (Required)

Confirm Password (Required)

CONTINUE

Security Information

ENTER PERSONAL INFORMATION | EMAIL ADDRESS VERIFICATION | SET USER ID AND PASSWORD | SET SECURITY QUESTIONS AND PHONE NUMBERS

Security Questions

Please select three security validation questions and provide answers that others cannot easily guess.

Question: <Select a Question>

Answer: (Required)

Question: <Select a Question>

Answer: (Required)

Question: <Select a Question>

Answer: (Required)

Phone Numbers

Here are your current phone numbers.

Primary (Home) (414) 298-2000

Secondary (Work) (473) 443-2999

Other (Mobile) (920) 960-0710

Fax (262) 930-2999

CONTINUE

DISCLOSURE: Upon choosing submit, your delivery preferences will be automatically defaulted to electronic delivery of all document types. You will be able to change your delivery preferences after completing this step. Delivery preferences can be changed at any time by visiting the Account Services tab in Baird Online.

eDelivery Preferences

ENTER DELIVERY PREFERENCES | VERIFY YOUR NEW PREFERENCES | UPDATES RECEIVED

Your current preferences

Account	Name	Statements	Confirms	Client Communications
		<input type="checkbox"/> All Electronic <input type="checkbox"/> All Paper	<input type="checkbox"/> All Electronic <input type="checkbox"/> All Paper	<input type="checkbox"/> All Electronic <input type="checkbox"/> All Paper
83049081	John - Trad IRA	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper
16391382	Julie - Riverfront	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper
10000024	John - Roth	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper
10000021	Julie - Individual	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper
21212141	Julie - Trad IRA	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper
21212144	Suzie - UTMA (Child)	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper

Footnotes +

Next

4. Congratulations, your registration is complete! Review and complete the Baird Online Terms of Use agreement. And then click on any of the tabs to navigate and view your account information.

BairdOnline

Settings Help Logout

My Portfolio Account Details Investing Tools Account Services Documents

Baird Online Terms of Use

These Baird Online Terms of Use shall govern your access and use of any other websites or systems of Robert W. Baird & Co. Incorporated or its affiliates ("Baird"), including but not limited to the Baird Online Internet site, mobile application or otherwise (collectively "Baird Online"), in exchange for access to the Baird Online, you ("Client") agree to comply with the following terms and conditions:

- 1. Availability of Baird Online Services**
Baird shall endeavor to make Baird Online services available 24 hours a day, 7 days a week, except during maintenance periods or when circumstances beyond the control of either Baird or Baird's third-party service providers may occur.
- 2. Data Integrity**
Baird will make reasonable efforts to accurately update all information displayed in Baird Online on a daily basis. Client acknowledges that such information is provided to Client "as is" and for informational purposes only and agrees that Baird account statements and transaction confirmations are the official record of account transactions, positions, and balances executed and maintained at Baird. All information accessed or viewed on Baird Online is confidential and for authorized use only.
- 3. Baird Internal Security**
Baird will use commercially reasonable technology such as computer "firewalls" and data encryption to prevent unauthorized access to Client's Account information via Baird Online. Client understands and agrees that the Internet is not a secure communications network, these security measures cannot provide absolute protection of information accessed through and unauthorized parties may access these communications.

I have read and agree to the Terms of Use

Submit



Baird Online – Registering is Easy!, *continued*

Clients new to Baird Online will view all accounts that match their Social Security / Tax ID number. If you would like to view additional accounts within your household, please contact your Financial Advisor or Client Specialist; or contact our Baird Online Help Desk at 888-212-8843 or BOLHelpDesk@rwbaird.com.

If you have questions or need more information, please contact: Baird Online Help Desk 1-888-212-8843 or e-mail at: bairdonline@rwbaird.com