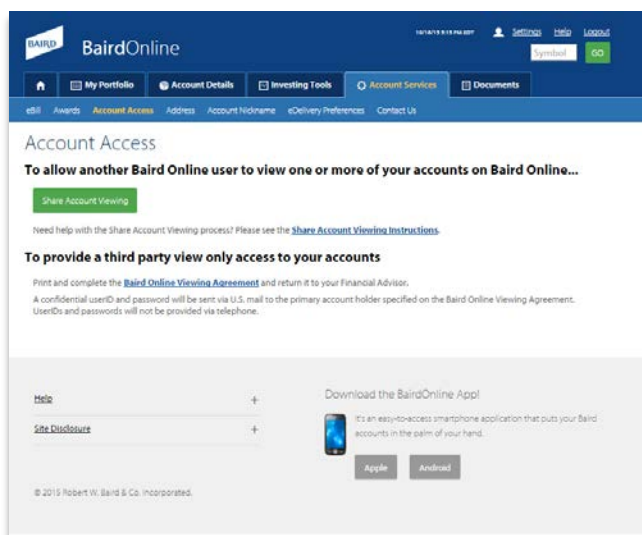




# Baird Online – Sharing Account Access

To proceed with account sharing, the person you are sharing with must have a registered Baird Online User ID. If they do not, you will need to print and complete the [Client Information Instruction and Access Authorization](#).

1. Click on **Account Services**, select **Account Access**, and click the **Share Account Viewing** button

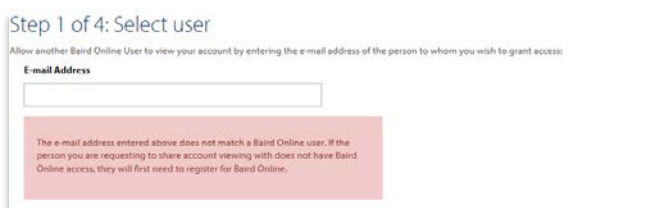


2. Enter the **e-mail address** associated with the account you would like to share your accounts with.



If the e-mail address you are looking to share account access with does not have a Baird Online User ID, you will receive the following error.

*Please contact your Financial Advisor or the Baird Online Help Desk at 1-888-212-8843 for assistance.*



## Baird Online – Sharing Account Access, *continued.*

3. Select the accounts to share by checking the **Grant Account Access** check box. Review the Terms & Conditions, and click **Next**.

**Note: You can only share the accounts of those which you have ownership associated with.**

4. Verify the selections of the accounts you would like to share. Click **Send E-mail** to complete the process.

**Step 3 of 4: Verify selections**

An email requesting acceptance of shared account viewing will be sent to jghall@rwbaired.com for the following accounts:

| Account Number | Account Name       | Grant Account Access |
|----------------|--------------------|----------------------|
| 10001000       | A-Bank Trust       | Will not share       |
| 10001001       | G-John Ind         | Will not share       |
| 21212141       | E-Jon & Jane eBill | Requested to share   |
| 21212142       | C-John Ind         | Requested to share   |
| 21212143       | F-John Ind         | Requested to share   |
| 21212144       | D-Jane Ind         | Requested to share   |
| 21212145       | B-John IRA         | Will not share       |

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**Step 2 of 4: Select accounts**

Select the account(s) you want to grant shared account viewing to:

| Account Number | Account Name       | Grant Account Access                |
|----------------|--------------------|-------------------------------------|
| 10001000       | A-Bank Trust       | <input type="checkbox"/>            |
| 10001001       | G-John Ind         | <input type="checkbox"/>            |
| 21212141       | E-Jon & Jane eBill | <input checked="" type="checkbox"/> |
| 21212142       | C-John Ind         | <input checked="" type="checkbox"/> |
| 21212143       | F-John Ind         | <input checked="" type="checkbox"/> |
| 21212144       | D-Jane Ind         | <input checked="" type="checkbox"/> |
| 21212145       | B-John IRA         | <input type="checkbox"/>            |

n/a This account is not eligible to be shared because you only have view only access to it.

**Terms & Conditions**

You must read and agree to the following "Terms & Conditions" to grant viewing access on the selected accounts.

By agreeing to the Terms & Conditions I instruct Baird to send an invitation to establish view-only access to the account(s) selected above to the e-mail address indicated. I understand that following a successful login to Baird Online via the Baird Online User ID associated with the e-mail address indicated, Baird will share my first and last name and status as a Baird client with the user.

☐ I have read and agree to the Terms & Conditions

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5. The final step is confirmation the email was sent to the intended recipient. You will receive a confirmation e-mail once the recipient accepts your invitation to share your accounts online.

**Step 4 of 4: Email sent**

 **An e-mail has been sent to** **requesting their acceptance of your invitation to share account viewing.**

If the user accepts you will be notified via e-mail to log in and verify that you are now sharing account viewing with the correct person.

Thank you.

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