

Baird Insurance Solutions

Risk management based on your needs.

There are some risks to your family's financial future that you just can't control. At Baird, we know that catastrophic events can strike families at any time, often resulting in uncertain new realities for even the most well-designed and carefully executed wealth management plans. That's why our Financial Advisors apply significant research, perspective and expertise when helping you devise a plan to protect your family from forces beyond anyone's control.

As an independent consultant in insurance planning, Baird can provide you with unbiased solutions to address a wide range of risk management needs, including family wealth protection, estate liquidity, business succession and other specialized applications. We work with highly rated insurance companies to offer a broad platform of protection products to help ensure your risk management needs are met.

Key Benefits for You

- Baird does not offer a proprietary suite of insurance products. We provide objective advice and product solutions to meet your specific needs based on your Baird Financial Advisor's comprehensive understanding of your financial situation and preferences.
- Baird's team of insurance experts has conducted extensive due diligence and research on a universe of select providers to ensure you have access to best-in-class options for life, long term care and disability income insurance.
- Your Baird Financial Advisor works collaboratively with the insurance provider selected for you to ensure the smooth implementation of recommended strategies.
- By integrating insurance solutions with your broader investment and wealth management plans, you have

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the opportunity to review your policies with your Baird Financial Advisor as your needs and objectives evolve to ensure the provider and policies recommended remain aligned with your long-term strategy.

Additional Features

- Access to 15–20 preferred insurance providers, selected for their product and credit quality and extensive industry expertise
- Coordination between your Financial Advisor, Baird’s internal financial planning experts and your recommended insurance provider to help ensure your insurance solutions work in concert with your broader financial and life plans
- Ongoing oversight and rigorous review of preferred insurance providers using objective criteria

A True Financial Partnership

For more than 90 years, Baird has provided personalized wealth management advice and comprehensive investment solutions for high-net-worth individuals, families, organizations and businesses.

Contact your Baird Financial Advisor for a true partner committed to great outcomes in your financial life.

