What We Do For You

Lifestyle Management

- ☐ Net Worth Analysis
- ☐ Income Needs Analysis
- ☐ Automatic Required Minimum Distribution
- ☐ Saving Goals
- ☐ Education Goals
- ☐ eBill
- ☐ Baird Online
- ☐ Cash Management
    - ☐ Set Up Monthly Electronic Transfer
    - ☐ Direct Deposit
    - ☐ Platinum MasterCard®
    - ☐ 24/7 Fraud Protection
    - ☐ Baird pays Foreign Transaction Fees
    - ☐ ATM Access Through MasterCard®
    - ☐ Rebates for ATM Transaction Fees
    - ☐ Free Checks
    - ☐ Award Points
    - ☐ Concierge Services

Estate Planning

- ☐ Review
    - ☐ Wills
    - ☐ Trusts
    - ☐ Powers of Attorney
- ☐ Business Succession Plan
- ☐ Incapacity Plan
- ☐ Referrals to Outside Professionals

Philanthropy

- ☐ Review
    - ☐ Donor Advised Fund
    - ☐ Charitable Remainder Trust
    - ☐ Family Foundation
    - ☐ Direct Donation
- ☐ Referrals to Outside Professionals

Risk Management

- ☐ Review
    - ☐ Life Insurance
    - ☐ Long-Term Care Insurance
    - ☐ Health Insurance/Medicare
- ☐ Social Security Benefit Analysis
- ☐ Referrals to Outside Professionals

Liability Management

- ☐ Review
    - ☐ Home Loan
    - ☐ Car Loan
    - ☐ Credit Card Loan
    - ☐ Business Loan
- ☐ Debt Repayment Plans

Asset Management

- ☐ Comprehensive Financial Plan
    - ☐ Cash Flow Projection with Monte Carlo Analysis
    - ☐ Annual Monitoring of Plan
    - ☐ 360 Wealth
- ☐ Passive vs. Active Manager Selection
- ☐ External 401(k)/403(b) Asset Allocation Recommendation
- ☐ Tax Management Overlay Management
- ☐ Asset Overlay Management
- ☐ Total Return Strategy for your cash flow needs
- ☐ Asset Allocation Plan
- ☐ Objective Asset Manager Selection
- ☐ Rebalancing of Asset Allocation
- ☐ Tactical or Strategic Asset Allocation Models
- ☐ ETFs, Mutual Funds, and/or Separately Managed Accounts depending on client
- ☐ 529 Plans
- ☐ Alternatives
    - ☐ Hedge Funds
    - ☐ Managed Futures
    - ☐ Private Equity

Matthew Pruyn, CFP®, ADPA®
Financial Advisor
227 W. Monroe Street, Suite 2300, Chicago, IL 60606
Direct: 312-609-4947 | Fax: 312-332-1920
Email: mpruyn@rwbaird.com
Website: www.bairdfinancialadvisor.com/matt.pruyn