

What We Do For You

BAIRD

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



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