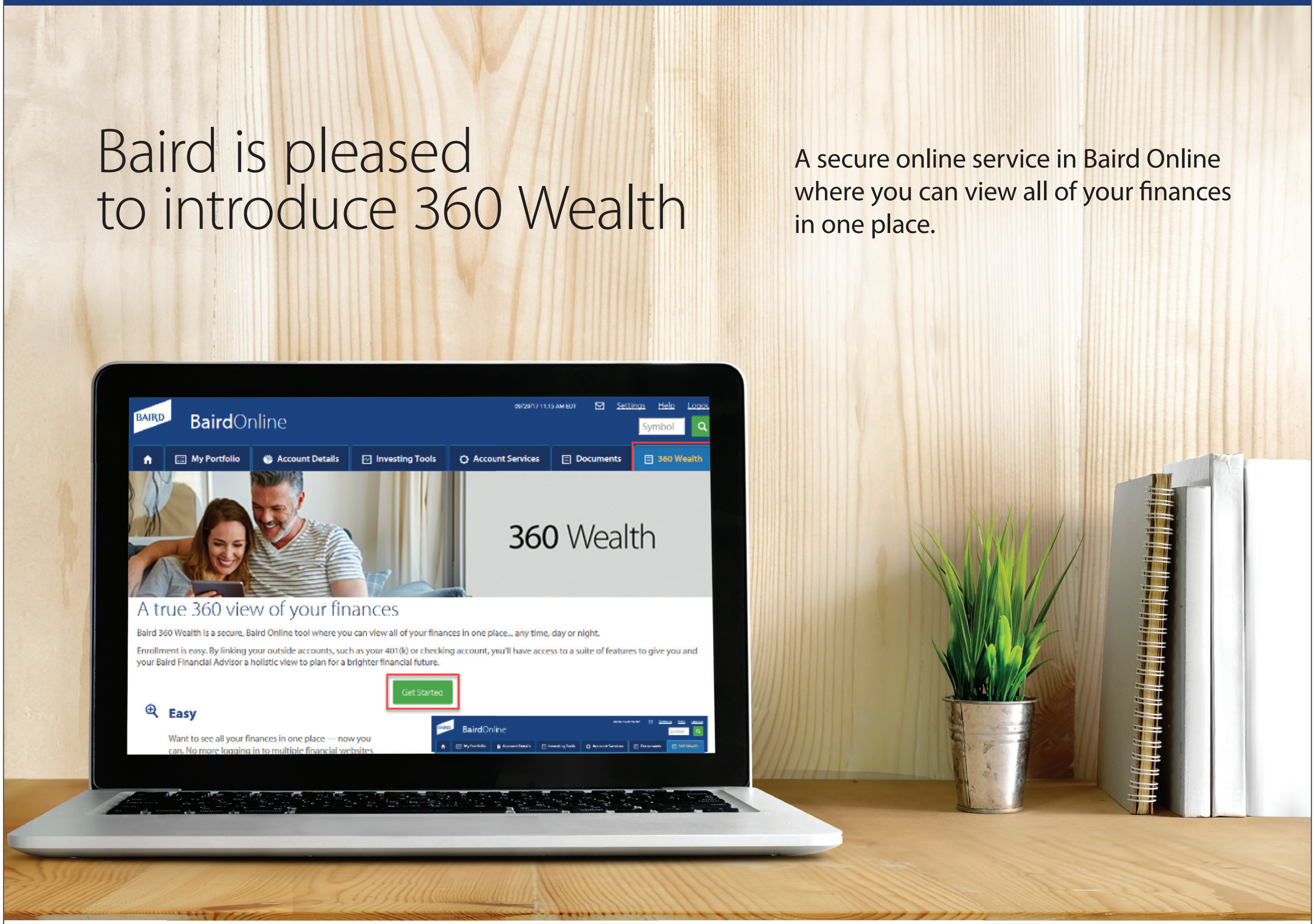
Baird Online – 360 Wealth

Getting Started

Baird is pleased to introduce 360 Wealth

A secure online service in Baird Online where you can view all of your finances in one place.



To get started, just follow this step-by-step guide:

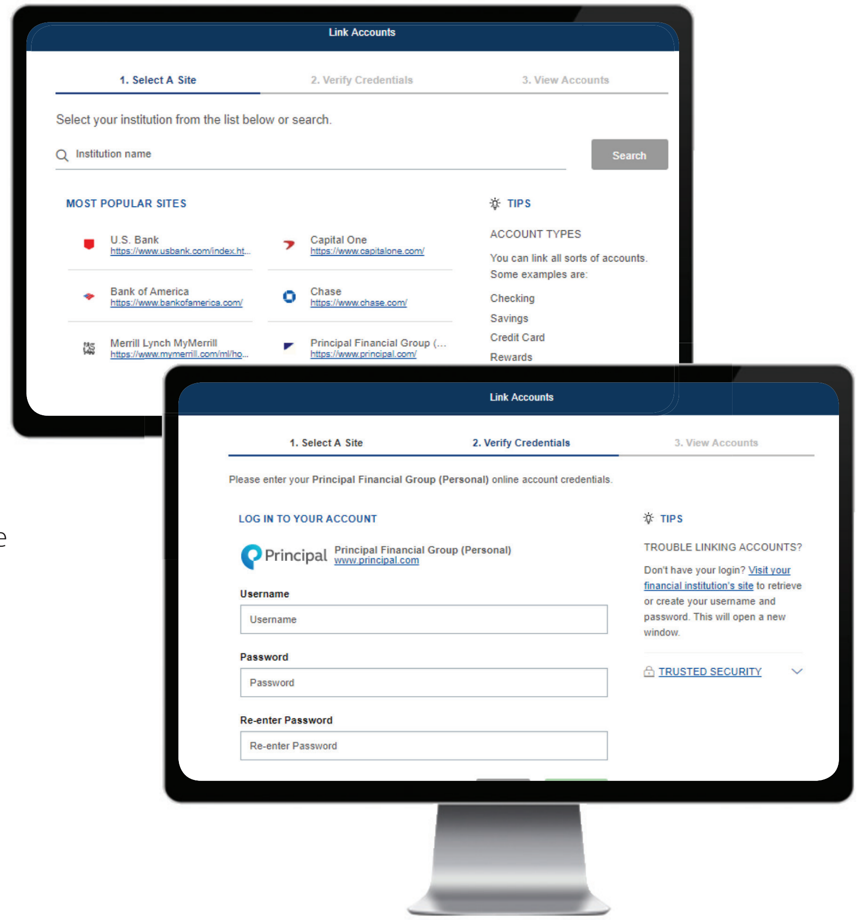
1 Have your user IDs and passwords for all your non-Baird accounts ready.

2 Login to Baird Online and click on the 360 Wealth tab.

3 Agree to the Terms and Conditions.

4 Link your non-Baird accounts.

Linking accounts



1

Select a Site

Popular banks and financial institutions are automatically populated as options. You have the option to link your home value and also have the ability to search for any site that isn't listed.

2

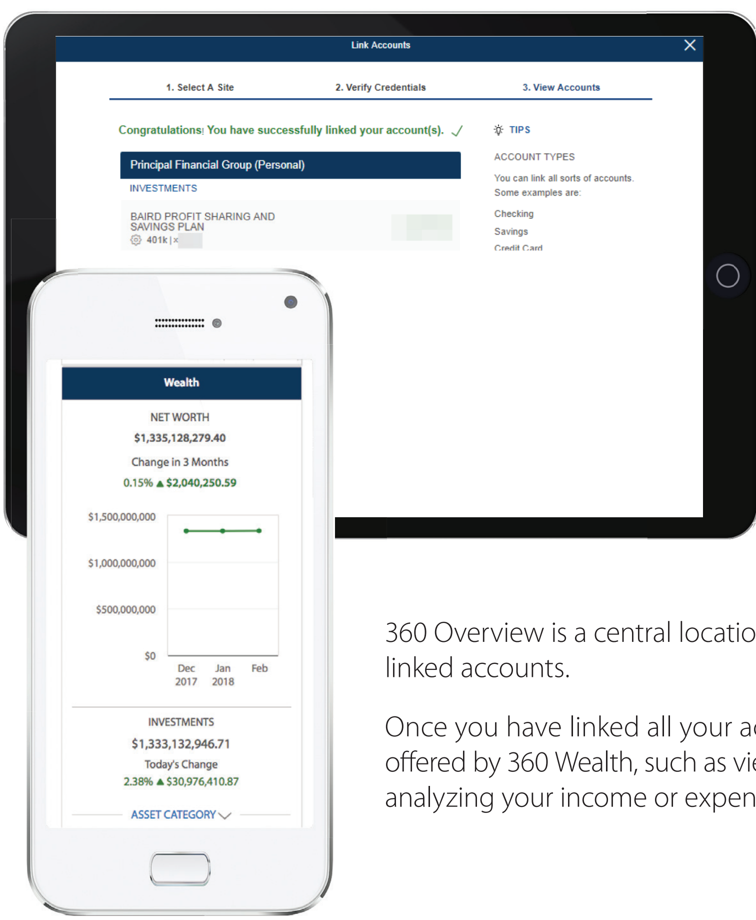
Enter Credentials

Enter the login credentials for each of your outside accounts so that 360 Wealth can access each account and consolidate the information into one location. Then click **Submit**.

3

View Accounts

Once you have successfully linked your non-Baird accounts, you will be prompted to link additional accounts or complete the registration process.
Note: You can return at any time to link additional sites.



4

All Done

Click on **All Done** to proceed to the 360 Wealth Dashboard.

360 Overview is a central location that lets you view a summary of your linked accounts.

Once you have linked all your accounts, you can enjoy the features and tools offered by 360 Wealth, such as viewing your net worth, setting up a personal budget, analyzing your income or expenses and reviewing your cash flow.