

Wealth Management Services

Planning		Investments and Lending Solutions			Corporate and Executive Services	Client Enabling Technology
<p>FINANCIAL PLANNING</p> <ul style="list-style-type: none"> • Goal Setting • Cash Flow Analysis • Annual Review <p>ESTATE PLANNING</p> <ul style="list-style-type: none"> • Document Review • Trust Planning • Incapacity Planning • Family Gifting • Estate Tax Modeling <p>RETIREMENT PLANNING</p> <ul style="list-style-type: none"> • Income Strategies • Savings Strategies • Social Security Strategies <p>TRUST SERVICES</p> <ul style="list-style-type: none"> • Corporate Trustee • Personal Representative • Fiduciary 	<p>EDUCATIONAL PLANNING</p> <ul style="list-style-type: none"> • Needs Analysis • 529 Plans • Custodial Accounts <p>CHARITABLE PLANNING</p> <ul style="list-style-type: none"> • Donor-Advised Funds • Direct Donation <p>TAX PLANNING</p> <ul style="list-style-type: none"> • Charitable Giving • Legislative Updates • Tax Reviews <p>INSURANCE PLANNING</p> <ul style="list-style-type: none"> • Annuities • Life Insurance • Long-Term Care • Disability Income 	<p>PORTFOLIO PLANNING</p> <ul style="list-style-type: none"> • Investment Policy • Risk Tolerance Assessment • Asset Allocation Models • Portfolio Review <p>EQUITIES</p> <ul style="list-style-type: none"> • Stocks • Mutual Funds • ETFs • Listed Options <p>CASH MANAGEMENT</p> <ul style="list-style-type: none"> • Check Writing • Debit Card • Direct Deposit Services • Award Points • Concierge Services <p>ALTERNATIVE INVESTMENTS</p> <ul style="list-style-type: none"> • Private Equity • Managed Futures • Specialty Mutual Funds 	<p>FIXED INCOME</p> <ul style="list-style-type: none"> • Corporate Bonds • Treasury Bonds • Municipal Bonds • CDs <p>MONEY MARKET</p> <ul style="list-style-type: none"> • Insured Deposits • Money Market Funds <p>OTHER INVESTMENTS</p> <ul style="list-style-type: none"> • REITs • Master Limited Partnerships • Unit Investment Trusts <p>ADVISORY SERVICES</p> <ul style="list-style-type: none"> • Expert Due Diligence • Asset Manager Selection • Mutual Fund and ETF Portfolios • Separately Managed Accounts 	<p>LENDING SERVICES</p> <ul style="list-style-type: none"> • Securities-Based Solutions • Margin Loans <p>ONGOING MONITORING</p> <ul style="list-style-type: none"> • Performance Reporting • Portfolio Review and Rebalancing • Identify Theft Protection 	<p>RETIREMENT PLANS</p> <ul style="list-style-type: none"> • Defined Contribution • Defined Benefit • IRA-Based • Non-Qualified Deferred Compensation <p>EXECUTIVE SERVICES</p> <ul style="list-style-type: none"> • Stock Option Exercises • Restricted Stock Services • Rule 144 Stock Sales • 10b5-1 Trading Plans <p>BUSINESS SUCCESSION AND SALE</p> <ul style="list-style-type: none"> • Entity Structure • Shareholder Agreements • Valuation Discounts • Buy / Sell Funding • Key Person Insurance • M&A Advisory • Sale Advisory Valuations • Equity / Bond Offerings • Capital Markets Access 	<p>BAIRD ONLINE</p> <ul style="list-style-type: none"> • Client Portal • e-Bill • Online Transfer • Baird Market Research • Phone & Tablet App <p>COMMUNICATION</p> <ul style="list-style-type: none"> • Electronic Signature • Flexible e-Delivery • Secure DocExchange • Email Encryption

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