

Trusted Contact Authorization

<p><i>INSTRUCTIONS: Complete this form to designate a "Trusted Contact" for your Baird accounts. A Trusted Contact is someone other than you (account owner), whom Baird can contact and is authorized to disclose information ONLY when the specific issues or concerns occur as described in the terms and conditions below.</i></p>	<p>Request # (Baird Office Use Only)</p>
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Baird Client Account Owner (a separate form is required for each account owner)

Full Client Name

Client's Trusted Contact

- Trusted Contact must be someone **OTHER** than the account owner.
- Only **one Trusted Contact** can be designated for each account owner.
- Trusted Contact must be **at least 18 years of age**.
- It is recommended that Trusted Contact should **NOT** be a spouse or significant other living in the same household.

Full Name of Trusted Contact	Phone Number	E-mail
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Relationship to Client

Street Address	City	State	Zip	Country
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Client Acknowledgment and Agreement

Client hereby authorizes Robert W. Baird & Co. Incorporated or Client's Baird Financial Advisor (collectively, "Baird") to contact the client's Trusted Contact designated above on the terms and conditions described herein.

The undersigned understands, acknowledges and agrees as follows:

- Baird is authorized to contact Client's Trusted Contact:
 - to address possible financial exploitation
 - to confirm the specifics of Client's current contact information, health status or the identity of any legal guardian, executor, trustee or holder of a power of attorney, or
 - as otherwise permitted by FINRA Rule 2165 (Financial Exploitations of Specified Adults)
 - Client understands Baird may disclose with Client's Trusted Contact that client holds accounts with Baird. No financial information will be shared with Client's Trusted Contact
- Baird may, but is not obligated to, contact any Trusted Contact, and Baird shall not be liable to Client or any other third party for any loss, claim or expense caused by or related to any act or failure to act in reliance upon the authorizations and instructions provided herein
- If Client is a non-individual, such as a trust, corporation, partnership or other entity, Client agrees Baird may, in Baird's sole discretion, treat Client's authorized representatives' Trusted Contact, if any have been provided to Baird, as a Trusted Contact of Client
- Client confirms the Trusted Contact is at least 18 years of age
- I understand that completion of this form is optional, and I may withdraw it at any time by notifying Baird in writing

Client Signatures and Date

Signature	Print Full Client Name	Date (MM-DD-YYYY)
X		