

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 • Annuities <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 • Coverdell ESAs <p>CHARITABLE PLANNING</p> <ul style="list-style-type: none"> • Charitable Trusts • Private Foundations • Donor-Advised Funds • Direct Donation <p>TAX PLANNING</p> <ul style="list-style-type: none"> • Investment Taxes • 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 • High-Yield 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

As part of a holistic review of a client's situation, Baird Financial Advisors may review your tax or legal documents. While Baird does not offer tax or legal advice, our Financial Advisors regularly work with Baird's Estate Planning Professionals as well as their clients' attorneys and tax professionals to help ensure that all phases of wealth management are addressed.

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