WEALTH SOLUTIONS GROUP

BAIRD
Private Wealth Management

BairdOnline – 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... any time, day or night. Enrollment is easy. By linking your outside accounts, such as your 401K or checking account, you'll have access to a suite of features to give you and your Baird Financial Advisor a holistic view to plan for a brighter financial future.

BOL Service Desk

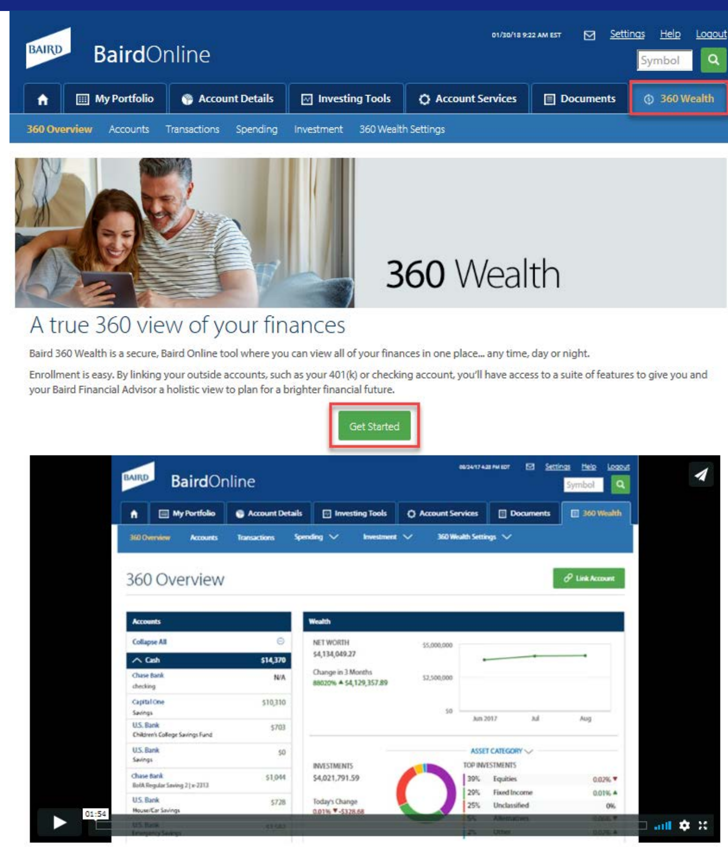
Monday – Friday 7am -6pm
1-888-212-8843
bairdonline@rwbaird.com

January, 2018

GET STARTED

1. Have your user IDs and passwords for all your non-Baird accounts ready.
2. Login to Baird Online at http://www.bairdonline.com and click on the **360 Wealth** tab.
3. Agree to the Terms & Conditions, enrollment is a one-time process.
4. Once you agree to the Terms & Conditions, you will be taken to the screen where you will begin the process of linking your non-Baird accounts.

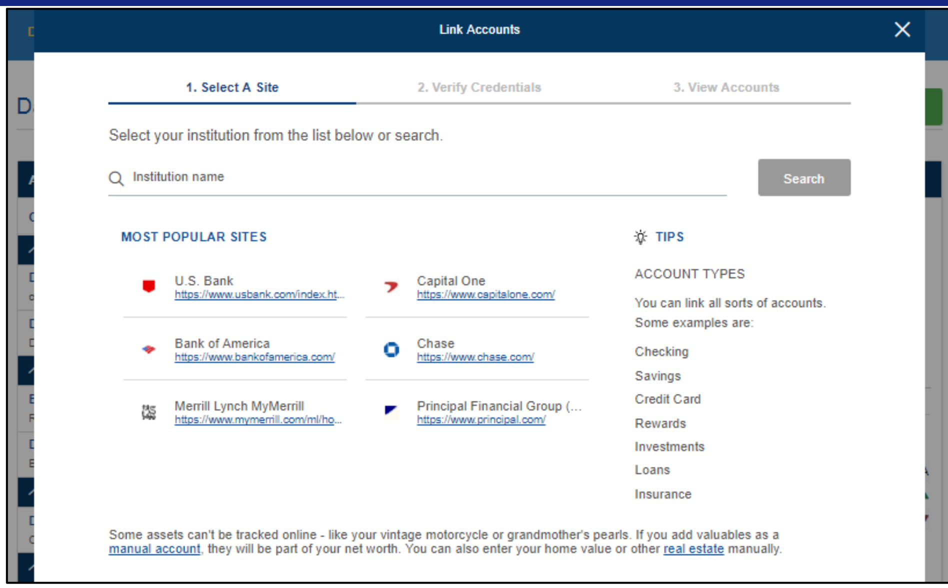
You can easily add **Cash** (checking & savings accounts), **Investments** (401K), **Credit cards**, **Mortgage**, **Insurance**, **Reward program accounts**, and more. *The more accounts you link, the more complete your financial picture.

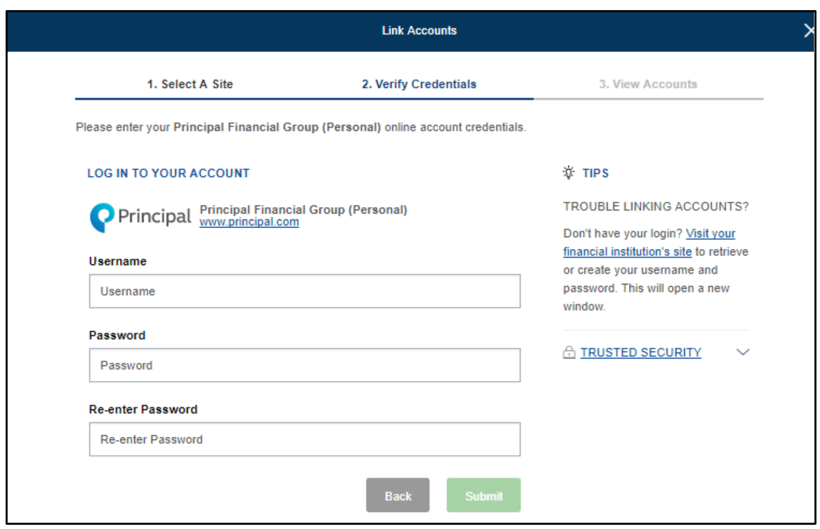


*You don't need to add your Baird accounts; they are automatically added for you.

We understand your privacy is important and therefore only you can see your detailed transactions. Only balance level information is provided to your Financial Advisor for planning purposes. Note: Information gathered from external accounts is "read only", nobody can transact on these accounts through 360 Wealth.

LINKING ACCOUNTS



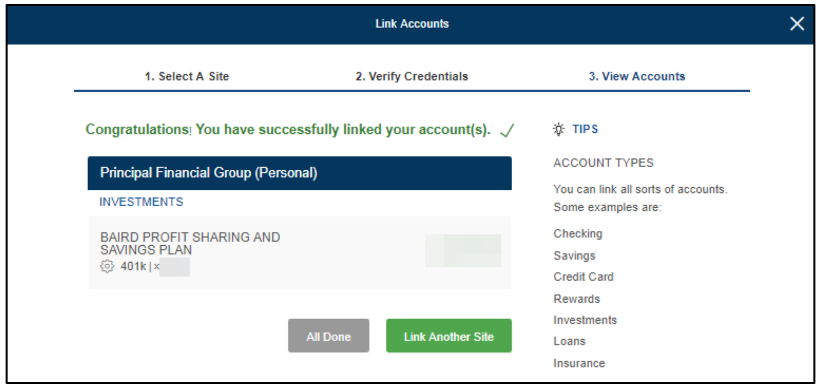


1. **Select site:** Popular banks and financial institutions are automatically populated as options. You also have the ability to search for any site that isn't listed.

2. **Enter your – User ID and password** for each outside account so that 360 Wealth can access each account and consolidate the information into one location, then click **Submit**.

1. 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.

2. Click on **All Done** to proceed to the 360 Wealth Dashboard and click **Link Another Site** to add additional accounts.



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 while also reviewing your Cash Flow.