

The Baird logo consists of the word "BAIRD" in white, uppercase, sans-serif font, set against a dark blue parallelogram background.

Private Wealth
Management

A True Partner to Cleveland

Baird is an employee-owned, international financial services firm with more than \$167 billion in client assets. We provide wealth management, capital markets, asset management and private equity services through offices and operating affiliates in the United States, Europe and Asia. As employee-owners, we manage for the long term, continuously building capabilities to best serve clients. And we conservatively manage our balance sheet and capital position to maintain financial flexibility in challenging market conditions.

A truly unique approach

Baird's mission – to provide the best financial advice and service to our clients and to be the best place to work for our associates – has shaped our vision for Cleveland since we opened our office here more than 15 years ago. Our belief in that mission is reflected in the Baird Branch of the Year honors we earned in 2004, 2007, 2008 and 2016. As a team, we strive to develop lifelong relationships with our clients and colleagues while maintaining an honest, energetic and enthusiastic work environment.

Our independence enables a genuinely open architecture, free from the proprietary product and service pushes behind similar claims by other firms. Here you are encouraged and enabled to always do what's best for your clients, without interference. And employee-ownership lets us invest in our business over the long term, unburdened by the short-term expectations of outside interests.



Our commitment to you

Keeping clients' interests first means being a part of their lives and understanding what they care about. It's a process that begins with advisors like you and supporting your important relationships, but it goes beyond that too. Baird's partnership with Cleveland and the people who live here grows naturally from the fact that we're here every day, living, working and volunteering in the community we care so much about.

The following are some of the many charitable and service organizations Baird's Cleveland associates support through donations of time, talent and resources:

Achievement Centers for
Children – Camp Cheerful
St. Martin de Porres –
A Cristo Rey Network School
Womankind
British-American Chamber
of Commerce
Make-a-Wish Foundation
Milestones Autism Resources
Big Brothers and Big Sisters
Matthew's Lending Library
John Carroll University –
Entrepreneurs Association

Rotary Club of Cleveland
Old Stone Education Center
Wings of Mercy
The Black Swamp
Conservancy
National Wheelchair
Basketball Association (NWBA)
Tri-Motor Heritage
Foundation
Aircraft Owners and Pilots
Association
Recovery Resources

The Baird advantage

Baird attracts many of the industry's finest Financial Advisors by supporting their entrepreneurial spirit and helping them build and run their businesses. For nearly 100 years, we have provided the tools and environment advisors like you need to best guide and serve your clients:

- A partnership culture backed by employee-ownership
- Industry-leading research
- Significant personal wealth-building opportunities, including stock ownership, deferred compensation, profit-sharing and private equity investments
- A first-person internal service model, where live professionals respond in real time to your operations, compliance, marketing, client event and human capital needs
- Deep, in-house expertise for all areas of financial planning; education savings; retirement, tax and estate planning; and risk management
- Full-service support and state-of-the-art technology
- A team of dedicated specialists focused on making your transition to Baird as smooth as possible for you and your clients

Recent honors

- Recognized as one of the *Fortune* 100 Best Companies to Work For® since 2004
- Baird was again recognized for the strength of its institutional equities platform in Greenwich Associates' 2016 survey of small- and mid-cap fund managers. The firm ranked as the No. 1 overall "important small-/mid-cap research advisory firm" and also received six No. 1 rankings for the quality and service of our research, sales and corporate access.
- Acknowledged in *Barron's*, *The Wall Street Journal* and other publications as having some of the nation's top wealth advisors
- Baird Branch of the Year (Cleveland) – 2004, 2007, 2008, 2016
- Baird Branch Manager of the Year (Kurtz) – 2015
- On Wall Street Top 10 Branch Manager Award (Kurtz) – 2016



Your management team

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To learn more about how bright your future can look at Baird, visit bairdcareers.com/advisors.

Greenwich Associates U.S. Equity Investors – Small-/Mid-Cap Funds, April 2016. Survey conducted with 96 small-cap and mid-cap fund managers. Rankings for qualitative metrics are based on leading research firms in survey.

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