Planning for the Future You Want

BAIRD

Private Wealth Management

Discovery Kit

We all have dreams for the future, such as living a fulfilling retirement, growing a family business or building a vacation home for multiple generations to enjoy. But having a dream is only the first step – those dreams will only remain dreams unless you create a path to achieving them.

We believe sitting down with you and talking through your values and priorities is one of our most important responsibilities. By getting to know you and the people you care about, we're able to map out a plan to achieve what you want most out of your life. This process can uncover potential opportunities and pitfalls – and provide reassurance that no matter how the markets or your own life might change, you can stay on track toward achieving your goals.

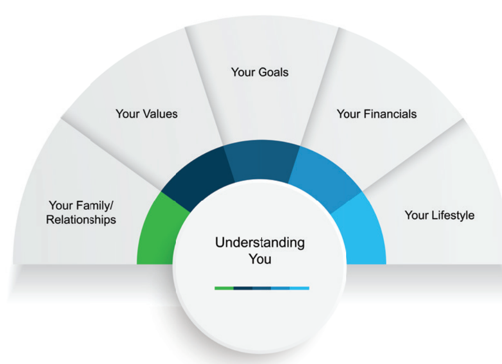
But it's important to understand this is a collaborative process. Whether you're someone who likes diving into the numbers or prefers talking about time spent with family, the more you share, the more robust and informed plan we can create. While some of the questions involve asset levels and how you've built your wealth, we'll also ask you about:

- ***Your family.*** **Who are the important people in your life? Are you close to any extended family? Do you have people you care about from a previous relationship?**
- ***Your health and wellness.*** **Do you have health concerns that could require attention in the future? Are there conditions that run in your family and could affect your health?**
- ***Your future.*** **What do you want your retirement to look like? Are there loved ones who might need to rely on you for care someday? What would you like your legacy to be?**

This Discovery Kit can help organize your financial and family information so you and your Baird Financial Advisor can make the best decisions going forward. Whether this is your first time working with your advisor or you're revisiting the plans you made together, sitting down with them and talking through this kit can be instrumental in helping you attain the future you want.

"Life never stops changing, and something that's etched in stone one year might be upended in the next. That's why we're always revisiting our clients' plans with them and growing our team of planning specialists – so no matter what life throws your way, we'll help you be ready for it."

Mike Schroeder
Chairman
Private Wealth Management



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