

Private Investment Management

Personal service and discretionary management from a trusted advisor

You know enough about investing to understand that when it comes to managed portfolios, one size definitely doesn't fit all. You are looking for a highly trained Financial Advisor you can trust to help you select the right investments and manage them in a way that works for you. You want that advisor to be someone who knows and understands your investment goals and has full authority to make day-to-day investment decisions on your behalf based on market activity or news that may impact your portfolio.

Baird's Private Investment Management (PIM) program combines the discipline of professional investment services with the familiarity, efficiency and access you receive from a discretionary relationship with a true partner – your Baird Financial Advisor.

Key Benefits for You

- Above and beyond the high standards Baird maintains for all of our Financial Advisors, those who qualify

to become PIM Managers undergo rigorous scrutiny and due diligence to ensure they employ best practices and comply with stringent industry regulations in the creation and management of your investment portfolio. Baird requires PIM Managers to complete a comprehensive portfolio management course or earn the Chartered Financial Analyst designation to demonstrate their proficiency and expertise. They must also meet a specific securities industry experience requirement.

- To ensure that the most appropriate investment solutions are selected for your portfolio, PIM Managers have access to Baird's own industry-leading equity and fixed income research, plus outside research from leading providers such as Value Line, Standard & Poor's, Morningstar and Credit Suisse. Your PIM Manager is also backed by an array of analysts and has a multitude of investment options available, including but not limited to stocks, bonds, mutual funds and exchange-traded funds.

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Private Investment Management, *continued*

- As a fully discretionary advisory solution, your PIM portfolio is constructed of individual investments designed to manage risk and achieve your specific objectives. Your PIM Manager continually monitors your portfolio while tracking market fluctuations and industry news that might impact performance and, through discretion, is empowered to act in real time to efficiently change investment vehicles and asset weightings based on your best interests.

- Depending on your overall wealth management needs, your PIM Manager may coordinate his or her account management with your other professional advisors to facilitate more integrated tax, financial and estate planning strategies to better align your investments with your long-term goals.

Additional Features

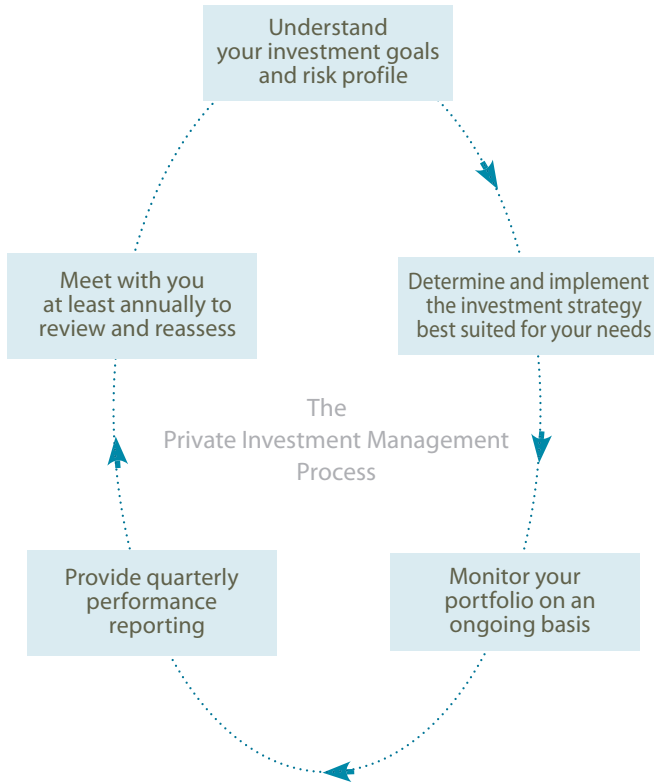
- Allowing your PIM Manager to act as your investment decision maker provides you with direct access to the person overseeing your investments. And the discretion you give to your PIM Manager allows them to make quick yet informed responses to your portfolio's needs.
- Quarterly, transparent performance reporting and an annual review provide you with peace of mind in the knowledge that your investments remain on track toward your goals.
- One quarterly asset-based fee covers all services involved in the PIM Program, including asset allocation, research, portfolio construction, custody, brokerage services, reporting and client service.

A True Financial Partnership

For more than 90 years, Baird has provided personalized wealth management advice and comprehensive investment solutions for high-net-worth individuals, families, organizations and businesses.

Contact Baird for a true partner committed to great outcomes in your financial life.

If you have questions or need more information, please contact:



Baird does not offer tax or legal advice.

Investing involves risks, including loss of principal. The quarterly asset-based fee mentioned is charged by Baird to the client for maintaining a separately managed account. It does not include the fees and other expenses of the funds or ETF in which the client's account is invested, such as management fees.