



## Our Wealth Management Process



### Review

#### Portfolio Analysis

Our team reviews your current portfolio to determine if your investments are properly positioned to meet your investment goals and guidelines, given the current and projected market environment.

**Seasoned. Disciplined. Responsive.**

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### **Guide** **Investment Policy** **Preparation & Review**

We provide our guidance to you in the creation or revision of your investment policy statement. An investment policy statement will serve as both the blueprint for building a strong investment foundation and the business plan for successful direction of your investment assets.

### **Allocate** **Asset Allocation Strategies**

The Dempsey Wrassman Smith Colangelo Group develops ongoing asset allocation strategies for your portfolio according to the objectives outlined in your investment policy statement.

### **Advise** **Investment Search & Selection**

Using the resources of Robert W. Baird & Co., we conduct thorough due diligence on investment managers and other possible portfolio investments to determine those we believe are best suited to your portfolio. We have experience providing investment manager recommendations within all types of portfolios.

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### **Monitor** **Ongoing Portfolio** **Monitoring**

Once your asset allocation is implemented, we monitor your portfolio and specific investments while keeping you up to date on your portfolio's performance, as well as changes that may affect your investment decisions.

### **Report** **Performance** **Reporting & Summary**

You will be able to access your financial information through a BairdOnline account. On a quarterly basis, you will receive reports that display timely, relevant information about your portfolio's performance. In addition, we also offer industry-leading market and portfolio analysis presented in a simple, easy to read format.

### **Educate** **Ongoing Investor** **Education & Guidance**

Through research reports and regulatory updates, we work to ensure you are not only satisfied with your investment results, but that you are well-informed of current economic and market conditions and the investment options available to you.