The ECAB Investment Group

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Keeping It Simple

Investments don't have to be complicated – not when you have a clear understanding of your goals and a thoughtful, proactive plan to achieving them. Our approach to wealth management is straightforward, cost-effective and tax-efficient, with minimal moving parts.

Our Services

Portfolio Management

- We advise on the implementation and ongoing management of an investment portfolio.
- Investments are designed around a core portfolio of high-quality individual holdings. We think and act like owners of the business, typically taking a long-term, buy-and-hold approach.
- We add diversification[1] where necessary, often incorporating outside institutional managers and bond portfolios.
- We keep clients informed as to the status and performance of their investment portfolio. This includes monthly statements, quarterly performance reports, conference calls and in-person reviews.
- We coordinate the Baird portfolio with client holdings held outside the firm. This includes work-sponsored 401(k) plans, executive compensation holdings such as restricted stock, non-qualified and incentive-based stock options, deferred compensation plans and other non-Baird investment accounts.

Portfolio Income Generation

- At some point, a portfolio's focus typically transitions from wealth creation to wealth preservation.
- We emphasize a strategy based on holding sufficient cash reserves to fund near-term cash needs, providing a buffer against short-term market volatility.
- The balance of the portfolio is designed to provide income to replenish these cash reserves while also providing sufficient growth to offset the longer-term impact of inflation.

Coordination With Other Trusted Advisors

- We work directly with our clients' accountants, attorneys and other trusted professionals to ensure the advice we provide is all working together toward our clients' goals.

Advanced Wealth Management Planning Issues

- We offer advice on charitable giving, wealth transfer and estate planning.

Full-Service Office Concept and Financial Concierge Capabilities

- We take a comprehensive approach to meeting the multi-generational goals of high net worth families by providing guidance on retirement planning, insurance planning, education planning, cash flow management and other financial concerns.

BAIRD
Private Wealth Management

[1]Diversification does not ensure a profit or guard against loss.
Robert W. Baird & Co. does not provide legal or tax advice.