

# Baird Private Wealth Management Services



## Financial and Estate Planning

### Financial Planning

Net Worth Statement  
Cash Flow Analysis

### Estate Planning

Document Review  
Trust Planning  
Incapacity Planning

### Retirement Planning

Income Strategies  
Savings Strategies  
Monte Carlo Analysis  
Social Security

### Educational Funding

Needs Analysis  
529 Plans  
Custodial Accounts  
Coverdell ESAs

### Tax Planning

Alternative Minimum Tax  
Charitable Planning  
Legislative Updates

### Wealth Transfer

Family Gifting  
Estate Tax Modeling  
Insurance Planning

### Charitable Giving

Charitable Trusts  
Private Foundations  
Donor-Advised Funds

### Income Protection

Annuities  
Life Insurance  
Long Term Care  
Disability Income

## Asset and Liability Management

### Investment Planning

Investment Policy  
Risk Tolerance Assessment  
Asset Allocation Analysis

### Alternative Investments

Private Equity  
Fund of Hedge Funds  
Structured Products  
Managed Futures  
Specialty Mutual Funds

### Other Investments

Commodities  
REITS  
Master Limited Partnerships  
Unit Investment Tools

### Ongoing Monitoring

Performance Reporting  
Portfolio Review and Rebalancing

### Equity Solutions

Stocks  
Mutual Funds  
ETFs  
Options

### Fixed Income Solutions

Corporate Bonds  
Treasury Bonds  
Municipal Bonds  
High-Yield Bonds  
CDs

### Advisory Solutions

Expert Due Diligence  
Mutual Fund and ETF Portfolios  
Separately Managed Accounts

### Cash Management

Checkwriting  
Debit Card  
Direct Deposit Services  
Award Points  
Concierge Services

### Money Market

Insured Deposits  
Money Market Funds

### Lending Services

Securities-Based Solutions  
Margin Loans

## Businesses and Executive Services

### Retirement Plans

401 (k)  
Defined Benefit  
Stock  
Deferred Comp  
Employee Seminars

### Business Succession and Sale

Choice of Entity  
Shareholder Agreements  
Valuation Discounts  
Buy/Sell Funding  
Key Person Insurance

M&A Advisory  
Sake Advisory  
Equity/Bond Offerings  
Entity Structure

### Executive Services

Stock Option Exercises  
Restricted Stock Services  
Rule 144 Stock Sales  
10b5-1 Trading Plans  
Executive Bonus Plans

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