

Wealth Management Services

Planning		Investments and Lending Solutions			Corporate and Executive Services	Client Enabling Technology
<p>FINANCIAL PLANNING Goal Setting Cash Flow Analysis Annual Review</p> <p>ESTATE PLANNING Document Review Trust Planning Incapacity Planning Family Gifting Estate Tax Modeling</p> <p>RETIREMENT PLANNING Income Strategies Savings Strategies Social Security Strategies Annuities</p> <p>TRUST SERVICES Corporate Trustee Personal Representative Fiduciary</p>	<p>EDUCATIONAL PLANNING Needs Analysis 529 Plans Custodial Accounts Coverdell ESAs</p> <p>CHARITABLE PLANNING Charitable Trusts Private Foundations Donor-Advised Funds Direct Donation</p> <p>TAX PLANNING Investment Taxes Charitable Giving Legislative Updates Tax Reviews</p> <p>INSURANCE PLANNING Annuities Life Insurance Long Term Care Disability Income</p>	<p>PORTFOLIO PLANNING Investment Policy Risk Tolerance Assessment Asset Allocation Models Portfolio Review</p> <p>EQUITIES Stocks Mutual Funds ETFs Listed Options</p> <p>CASH MANAGEMENT Check Writing Debit Card Direct Deposit Services Award Points Concierge Services</p> <p>ALTERNATIVE INVESTMENTS Private Equity Managed Futures Specialty Mutual Funds</p>	<p>FIXED INCOME Corporate Bonds Treasury Bonds Municipal Bonds High-Yield Bonds CDs</p> <p>MONEY MARKET Insured Deposits Money Market Funds</p> <p>OTHER INVESTMENTS REITs Master Limited Partnerships Unit Investment Trusts</p> <p>ADVISORY SERVICES Expert Due Diligence Asset Manager Selection Mutual Fund and ETF Portfolios Separately Managed Accounts</p>	<p>LENDING SERVICES Securities-Based Solutions Margin Loans</p> <p>ONGOING MONITORING Performance Reporting Portfolio Review and Rebalancing Identify Theft Protection</p>	<p>RETIREMENT PLANS Defined Contribution Defined Benefit IRA-Based Non-Qualified Deferred Compensation</p> <p>EXECUTIVE SERVICES Stock Option Exercises Restricted Stock Services Rule 144 Stock Sales 10b5-1 Trading Plans</p> <p>BUSINESS SUCCESSION AND SALE Entity Structure Shareholder Agreements Valuation Discounts Buy / Sell Funding Key Person Insurance M&A Advisory Sale Advisory Valuations Equity / Bond Offerings Capital Markets Access</p>	<p>BAIRD ONLINE Client Portal e-Bill Online Transfer Baird Market Research Phone & Tablet App</p> <p>COMMUNICATION Electronic Signature Flexible e-Delivery Secure DocExchange Email Encryption</p>

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