

What We Do For You



Lifestyle Management

- Net Worth Analysis
- Income Needs Analysis
- Automatic Required Minimum Distribution
- Saving Goals
- Education Goals
- eBill
- Baird Online
- Cash Management
 - Set Up Monthly Electronic Transfer
 - Direct Deposit
 - Platinum MasterCard®
 - 24/7 Fraud Protection
 - Baird pays Foreign Transaction Fees
 - ATM Access Through MasterCard®
 - Rebates for ATM Transaction Fees
 - Free Checks
 - Award Points
 - Concierge Services

Estate Planning

- Review
 - Wills
 - Trusts
 - Powers of Attorney
- Business Succession Plan
- Incapacity Plan
- Referrals to Outside Professionals

Philanthropy

- Review
 - Donor Advised Fund
 - Charitable Remainder Trust
 - Family Foundation
 - Direct Donation
- Referrals to Outside Professionals

Risk Management

- Review
 - Life Insurance
 - Long-Term Care Insurance
 - Health Insurance/Medicare
- Social Security Benefit Analysis
- Referrals to Outside Professionals

Liability Management

- Review
 - Home Loan
 - Car Loan
 - Credit Card Loan
 - Business Loan
- Debt Repayment Plans

Asset Management

- Comprehensive Financial Plan
 - Cash Flow Projection with Monte Carlo Analysis
 - Annual Monitoring of Plan
 - 360 Wealth
- Passive vs. Active Manager Selection
- External 401(k)/403(b) Asset Allocation Recommendation
- Tax Management Overlay Management
- Asset Overlay Management
- Total Return Strategy for your cash flow needs
- Asset Allocation Plan
- Objective Asset Manager Selection
- Rebalancing of Asset Allocation
- Tactical or Strategic Asset Allocation Models
- ETFs, Mutual Funds, and/or Separately Managed Accounts depending on client
- 529 Plans



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As part of a holistic review of a client's situation, Baird Financial Advisors may review your tax or legal documents. While Baird does not offer tax or legal advice, our Financial Advisors regularly work with Baird's Estate Planning Professionals as well as their clients' attorneys and tax professionals to help ensure that all phases of wealth management are addressed. ©2018 Robert W. Baird & Co. Incorporated. Member SIPC. MC-231990.