BairdOnline – 360 Wealth

Client Frequently Asked Questions

360 Wealth can help you manage your personal finances by bringing your online financial accounts (including investment, bank, credit card, loan, mortgage, and insurance accounts) into a single view. 360 Wealth securely stores that information for you, enabling you to access information for all of your enrolled accounts through Baird Online

BOL Service Desk

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What are the features of 360 Wealth?	In addition to account balances you'll have access to a suite of tools to help you set budget goals and track your spending, while also having a snapshot of your net worth.
How does 360 Wealth Work?	Select institutions where you hold an online account and enter your login credentials for those websites. There is no limit to the number of accounts you can add (including custom inputs such as your home value, automobiles, or other valuables). Each time you login, 360 Wealth securely scans the websites you've entered and brings the updated information into a single location within Baird Online 360 Wealth.
Do I have to link my Baird accounts?	No, when you enroll with this service, Baird Online automatically links all the accounts associated with your Baird Online User ID.
Is 360 Wealth Secure and Private?	Baird is committed to maintaining the highest levels of security and privacy for your personal information. All data is secured, to provide you with the security and privacy you have come to trust and expect from us.
Am I able to link any assets such as my home?	Yes, you can link assets such as your home or you have the option to manually add any assets (such as jewelry, art, cars etc.), that aren't associated with an actual online account.
Can my advisor see my information?	Your Financial Advisor will only have a snap-shot view of your accounts and assets. They will not see transaction-level detail from your 360 Wealth View. This insight into your total wealth picture gives your Advisor additional information and insight to help design a more comprehensive financial plan.
What types of accounts can I view?	There are currently over 15,000 financial institutions available, covering investment assets, checking accounts, credit cards, mortgages, loans and more.
Can I make account level changes for my linked accounts?	Non- Baird accounts within 360 Wealth are read-only. To make any changes to your account (such as account credentials) please visit the financial institution directly.
How much does it cost to use 360 Wealth?	This is a complementary service for Baird clients, there is no cost.

Can I pay my bills through 360 Wealth?	No, Baird 360 Wealth enables you to view your accounts all in one place, but you cannot pay your bills through 360 Wealth.
Which web browsers work best with 360 Wealth?	To ensure an optimal experience on Baird Online, we recommend using the latest versions of the following web browsers: • Internet Explorer • Chrome • Firefox
My institution isn't available through 360 Wealth. What are my options?	We recommend manually adding these accounts. Click on the Link Accounts button on any of the pages within 360 Wealth, open the FastLink window and click on the Manual Account link on the bottom of the window.
What if my account values on 360 Wealth aren't matching my financial institution values?	360 Wealth links directly to your accounts, providing an up-to-date reflection of your account values. Should you find a discrepancy in values, it could mean: 1. Account Values haven't been refreshed. Simply go to the Accounts tab and click on the refresh option to ensure your accounts values reflect their most recent values. 2. Your financial institution is having difficulty linking with 360 Wealth. Please check with your financial institution to inquire if they are having any known problems. **Note**: 360 Wealth will display those values which are made available by the corresponding financial institution.
What does "Needs Attention" mean?	This means 360 Wealth is not able to acquire the account values and transactions from your linked account. In many cases, it's because you have updated your password with your financial institution and the change isn't reflected on 360 Wealth. To update your password on 360 Wealth, click on the Accounts tab, click on the option to update your password.