

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

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
- 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 w/ Monte Carlo Analysis
 - Annual Monitoring of Plan
- Passive c. 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
- ETF's, Mutual Funds, and/or Separately Managed Accounts depending on client
- 529 Plans
- Alternatives
 - Hedge Funds
 - Managed Futures
 - Private Equity



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