# 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

### Wealth Transfer
- Family Gifting
- Estate Tax Modeling
- Insurance Planning

### Education Funding
- Needs Analysis
- 529 Plans
- Custodial Accounts
- Coverdell ESAs

### Charitable Giving
- Charitable Trusts
- Private Foundations
- Donor-Advised Funds

### Tax Planning
- Alternative Minimum Tax
- Charitable Planning
- Legislative Updates

## Asset and Liability Management

### Investment Planning
- Investment Policy
- Risk Tolerance Assessment
- Asset Allocation Analysis

### Equity Solutions
- Stocks
- Mutual Funds
- ETFs
- Options

### Cash Management
- Checkwriting
- Debit Card
- Direct Deposit Services
- Award Points
- Concierge Services

### Alternative Investments
- Private Equity
- Fund of Hedge Funds
- Structured Products
- Managed Futures
- Specialty Mutual Funds

### Fixed Income Solutions
- Corporate Bonds
- Treasury Bonds
- Municipal Bonds
- High-Yield Bonds
- CDs

### Money Market
- Insured Deposits
- Money Market Funds

### Other Investments
- Commodities
- REITs
- Master Limited Partnerships
- Unit Investment Trusts

### Advisory Solutions
- Expert Due Diligence
- Mutual Fund and ETF Portfolios
- Separately Managed Accounts

### Lending Services
- Securities-Based Loans
- Margin Loans

### Ongoing Monitoring
- Performance Reporting
- Portfolio Review and Rebalancing

## Business and Executive Services

### Retirement Plans
- 401(k)
- Defined Benefit
- Stock
- Deferred Comp
- Employee Seminars

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

### Business Succession and Sale
- Choice of Entity
- Shareholder Agreements
- Valuation Discounts
- Buy/Sell Funding
- Key Person Insurance
- M&A Advisory
- Sale Advisory Valuations
- Equity/Bond Offerings
- Entity Structure

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