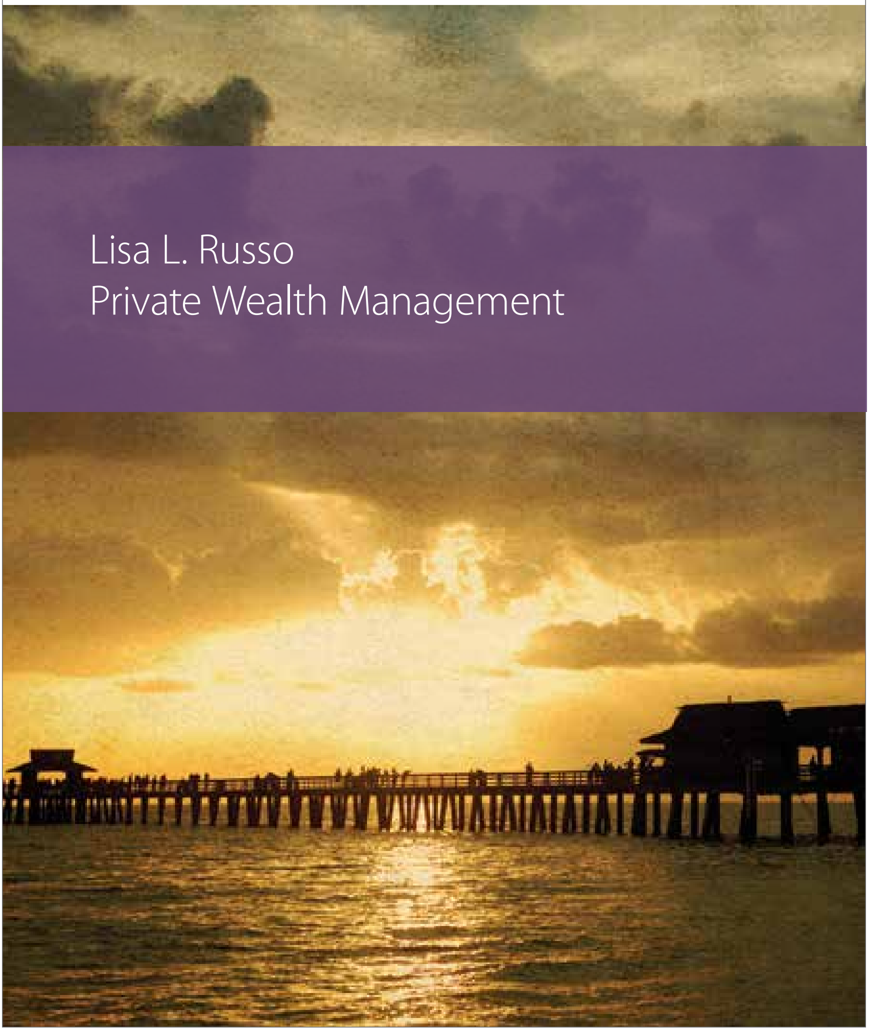
BAIRD

Lisa L. Russo
Private Wealth Management



Lisa L. Russo

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Private Wealth Management

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Private Wealth Management

Your needs are unique. As your Financial Advisor, my most important job is to truly understand who you are and what you want to accomplish. Baird provides a broad pool of research, resources and expertise, which I use to create solutions for you in the following areas:

Financial and Estate Planning

- Retirement and Education Planning
- Tax Planning
- Wealth Transfer
- Charitable Gifting

Investment Management

- Portfolio Management
- Comprehensive Advisory Solutions
- Brokerage Services
- Alternative Investments
- Cash Management

Risk and Liability Management

- Income Protection Strategies
- Lending Services
- Annuities
- Life and Long Term Care Insurance

My expertise can especially benefit women in transition as they plan for their futures.

A holistic approach to wealth management

Our practice offers a holistic approach to wealth management that emphasizes risk management and retirement income. We advise clients who are in retirement, who are about to retire, or who are preparing for retirement in the future. We present realistic, conservative strategies and are mindful of investment costs and taxes. We provide thorough, comprehensive reviews to make sure your investments remain on track and suited for your retirement goals. Most important, we help our clients find solutions to the key issues facing them, such as wealth transfer or the risk of outliving their money.

Our wealth management process, PAIR², begins with an in-depth discovery meeting to explore what you want your assets to accomplish for you and your family. We work with you to identify priorities unique to your circumstances. Then, together, we develop a step-by-step, long-term strategy, which we regularly monitor and adjust to ensure the plan consistently reflects your goals.

Our Four-Step PAIR² Process	
P P	Develop a **PERSONALIZED PLAN** for you
A A	Recommend an **ASSET ALLOCATION** mix based on your investment personality
I I	Choose **INVESTMENTS IMPLEMENTING** your strategy
R R	Meet with you for **REGULAR REVIEWS** to monitor your progress

I am very fortunate to be among those who love their life's work. I became a Financial Advisor because of my commitment to educate and empower my clients, helping them make informed decisions about their investments and their future. It is especially gratifying to be partnered with Baird Private Wealth Management, where we share the same client-first values and work ethic.

Lisa Russo, Financial Advisor

Vice President

Lisa earned her MBA from the University of South Florida in 1987 and her undergraduate degree from Florida State University. She has been a financial advisor since 2001, following her experience as a business owner for 12 years and an adjunct college professor teaching business courses. Lisa qualified for and was invited to attend the annual *Barron's* Winners Circle Top Women Advisors Summit from 2008 through 2015.

Lisa serves as Vice President of the board of the Johnson Singer Foundation, an independent, private family foundation, and is involved with charitable giving and philanthropic planning. She is also a member of Sarasota Architectural Foundation and Fast Friends Greyhound Adoption.
A Sarasota native, Lisa's interests include mid-century modern architecture, yoga, boating and travel.

Noelle Cartier

Senior Client Specialist

Noelle has served in wealth management since 2002 and has worked with Lisa since 2007. She holds FINRA Series 7 and Series 66 licenses and is responsible for all aspects of client service administration, including research and preparation for comprehensive client reviews. Noelle graduated from the University of South Florida in 2000 with a bachelor's degree in communications and studied at the Sorbonne in Paris in 1999. Noelle enjoys training for triathlons and has completed three Ironman Triathlons. She also enjoys hiking, reading and spending time with family and friends.

Why Baird?

An employee-owned, international firm, Baird is a trusted partner serving the wealth management needs of families, individuals and organizations from offices across the United States. Our culture has remained strong since 1919 by remaining true to our core ideals:

- Clients come first.
- Integrity is irreplaceable.
- Quality is our measure of success.
- The best financial advice is the result of expertise and teamwork.
- How we succeed is as important as if we succeed.
- We seek personal balance in home, work and community involvement.

Our mission is simple: to provide the best financial advice and service to our clients and be the best place to work for our associates. And we've found over time that the best way to achieve this is to act in our clients' best interests – always.