



# Baird Online – Registering is Easy!

## Getting Started:

Click on the link provided in the Baird Online registration email, or visit <https://bol.rwbaird.com/Register>.

1. Enter your Personal Information associated with your account. An email confirmation will be sent to the email address entered.

2. Click on the link in the email confirmation to continue the Baird Online registration process.



## Baird Online – Registering is Easy!, *continued*

### 3. Continue creating your User ID and Password, Security Questions, Telephone Number and eDelivery Preferences

**Register Online**

ENTER PERSONAL INFORMATION | EMAIL ADDRESS VERIFICATION | SET USER ID AND PASSWORD | SET SECURITY QUESTIONS AND PHONE NUMBERS

First Name (Required)

Last Name (Required)

Zip Code (Required)

Social Security Number (Required)

Date of Birth (Required)

Email Address (Required)

Need help with Online Registration? Choose either [video](#) or [pdf](#) instructions.

**Create Login**

ENTER PERSONAL INFORMATION | EMAIL ADDRESS VERIFICATION | SET USER ID AND PASSWORD | SET SECURITY QUESTIONS AND PHONE NUMBERS

User ID (Required)

- Between 6 and 20 characters
- Can be letters, numbers and/or symbols in any combination
- May not contain spaces

Password (Required)

Confirm Password (Required)

**Security Information**

ENTER PERSONAL INFORMATION | EMAIL ADDRESS VERIFICATION | SET USER ID AND PASSWORD | SET SECURITY QUESTIONS AND PHONE NUMBERS

**Security Questions**

Please select three security validation questions and provide answers that others cannot easily guess.

Question: <select a Question>

Answer: (Required)

Question: <select a Question>

Answer: (Required)

Question: <select a Question>

Answer: (Required)

**Phone Numbers**

Here are your current phone numbers.

Primary (Home)  Secondary (Work)  Other (Mobile)  Fax

**Disclosure**

AUTODETECT: Upon choosing submit, your delivery preferences will be automatically defaulted to electronic delivery of all document types. You will be able to change your delivery preferences after completing this step. Delivery preferences can be changed at any time by visiting the Account Services tab in Baird Online.

**eDelivery Preferences**

ENTER DELIVERY PREFERENCES | VERIFY YOUR NEW PREFERENCES | UPDATES RECEIVED

**Your current preferences**

Account	Name	Statements	Confirms	Client Communications
		<input type="checkbox"/> All Electronic <input type="checkbox"/> All Paper	<input type="checkbox"/> All Electronic <input type="checkbox"/> All Paper	<input type="checkbox"/> All Electronic <input type="checkbox"/> All Paper
83049081	John - Tred IRA	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper
16391382	Julie - Riverfront	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper
10000024	John - Roth	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper
10000021	Julie - Individual	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper	<input type="checkbox"/> Electronic <input checked="" type="checkbox"/> Paper
21212141	Julie - Tred IRA	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper
21212144	Suzie - UTMA (Child)	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper	<input checked="" type="checkbox"/> Electronic <input type="checkbox"/> Paper

Footnotes

### 4. **Congratulations**, your registration is complete! Review and complete the Baird Online Terms of Use agreement. And then click on any of the tabs to navigate and view your account information.

**Baird Online**

Settings | Help | Logout

My Portfolio | Account Details | Investing Tools | Account Services | Documents

**Baird Online Terms of Use**

These Baird Online Terms of Use shall govern your access and use of any other websites or systems of Robert W. Baird & Co. Incorporated or its affiliates ("Baird"), including but not limited to via the Baird Online internet site, mobile application or otherwise, collectively "Baird Online". In exchange for access to the Baird Online, you ("Client") agree to comply with the following terms and conditions.

- 1. Availability of Baird Online Services.**  
Baird shall endeavor to make Baird Online services available 24 hours a day, 7 days a week, except during maintenance periods or when circumstances beyond the control of either Baird or Baird's third party service providers may occur.
- 2. Data Integrity.**  
Baird will make reasonable efforts to accurately update all information displayed in Baird Online on a daily basis. Client acknowledges that such information is provided to Client "as is" and for informational purposes only and agrees that Baird account statements and transaction confirmations are the official record of account transactions, positions, and balances executed and maintained at Baird. All information accessed or viewed on Baird Online is confidential and for authorized use only.
- 3. Baird Internal Security.**  
Baird will use commercially reasonable technology such as computer "firewall" and data encryption to prevent unauthorized access to Client's Account information via Baird Online. Client acknowledges and agrees that the Internet is not a secure communications network, these security measures cannot provide absolute protection of information accessed through and unauthorized parties may access these communications.

I have read and agree to the Terms of Use



## Baird Online – Registering is Easy!, *continued*

Clients new to Baird Online will view all accounts that match their Social Security / Tax ID number. If you would like to view additional accounts within your household, please contact your Financial Advisor or Client Specialist; or contact our Baird Online Help Desk at 888-212-8843 or at [bairdonline@rwbaird.com](mailto:bairdonline@rwbaird.com).

If you have questions or need more information, please contact: Baird Online Help Desk 1-888-212-8843 or e-mail at: [bairdonline@rwbaird.com](mailto:bairdonline@rwbaird.com)