



Baird Online – 360 Wealth, Getting Started

Baird is pleased to introduce 360 Wealth, a secure online service in Baird Online where you can view all of your finances in one place... any time, day or night. Enrollment is easy. By linking your outside accounts, such as your 401K or checking account, you'll have access to a suite of features to give you and your Baird Financial Advisor a holistic view to plan for a brighter financial future.

To get started, just follow this step-by-step guide:

- 1) Have your user IDs and passwords for all your non-Baird accounts ready.
- 2) Login to Baird Online at <http://www.bairdonline.com> and click on the **360 Wealth** tab



- 3) Agree to the Terms & Conditions, enrollment is a one-time process.
- 4) Once you agree to the Terms & Conditions, you will be taken to the screen where you will begin the process of linking your non-Baird accounts.

GET STARTED

BairdOnline The Stenklyft Group 920-458-5506 06/22/17 11:22 AM EDT Settings Help Logout

My Portfolio Account Details Investing Tools Account Services Documents **360 Wealth**

360 Wealth

A true 360 view of your finances

Baird 360 Wealth is a secure, Baird Online tool where you can view all of your finances in one place... any time, day or night. Enrollment is easy. By linking your outside accounts, such as your 401K or checking account, you'll have access to a suite of features to give you and your Baird Financial Advisor a holistic view to plan for a brighter financial future.

Easy
Want to see all your finances in one place — now you can. No more logging in to multiple financial websites to get a handle on your finances. Simply add your existing financial accounts (non-Baird) to 360 Wealth through our easy to follow guided process. Right away you'll be able to see a real-time snapshot of your net worth.

Comprehensive
The more accounts you add, the more complete your financial picture. Link all your Cash (checking & savings), Investment (including your 401K), Credit Card, Mortgage, Loans, Real Estate, Insurance, Bills and your Reward points.

Secure
Baird is committed to maintaining the highest levels of security and privacy for your personal information. All data is secured within Baird, so we can provide you with the safety and privacy you have come to trust and expect from us.

360 Overview

Assets
Cash: \$12,379
Investments: \$1,188,889
Total: \$1,201,268

Investments
Total: \$1,188,889
Top Holdings: 100% Cash, 0% Bonds, 0% Stocks, 0% Alternatives

Identity
Name: [REDACTED]
Address: [REDACTED]
Phone: [REDACTED]

You can easily add **Cash** (checking & savings accounts), **Investments** (401K), **Credit cards**, **Mortgage**, **Insurance**, **Reward program accounts**, and more. *The more accounts you link, the more complete your financial picture.

*You don't need to add your Baird accounts; they are automatically added for you.

We understand your privacy is important and therefore only you can see your detailed transactions. Only balance level information is provided to your Financial Advisor for planning purposes. Note: Information gathered from external accounts is “read only”, nobody can transact on these accounts through 360 Wealth.

LINKING ACCOUNTS

Link Accounts

1. Select A Site 2. Verify Credentials 3. View Accounts

Select your institution from the list below or search.

Q Institution name

MOST POPULAR SITES

- U.S. Bank <https://www.usbank.com/index.ht>
- Capital One <https://www.capitalone.com/>
- Bank of America <https://www.bankofamerica.com/>
- Chase <https://www.chase.com/>
- Merrill Lynch MyMerrill <https://www.mymerrill.com/ml/tho...>
- Principal Financial Group (... <https://www.principal.com/>

TIPS

ACCOUNT TYPES

You can link all sorts of accounts. Some examples are:

- Checking
- Savings
- Credit Card
- Rewards
- Investments
- Loans
- Insurance

Some assets can't be tracked online - like your vintage motorcycle or grandmother's pearls. If you add valuables as a [manual account](#), they will be part of your net worth. You can also enter your home value or other [real estate](#) manually.

- Select site:** Popular banks and financial institutions are automatically populated as options. You also have the ability to search for any site that isn't listed.
- Enter your – User ID and password** for each outside account so that 360 Wealth can access each account and consolidate the information into one location, then click **Submit**.
- Once you have successfully linked your non-Baird accounts you will be prompted to link additional accounts or complete the registration process. Note: You can return at any time to link additional sites.

Link Accounts

1. Select A Site 2. Verify Credentials 3. View Accounts

Please enter your Principal Financial Group (Personal) online account credentials.

LOG IN TO YOUR ACCOUNT

Principal [Principal Financial Group \(Personal\)](http://www.principal.com) www.principal.com

Username

Password

Re-enter Password

TIPS

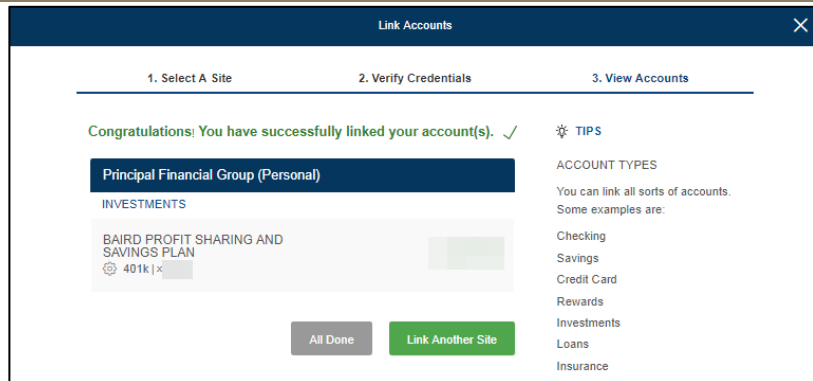
TROUBLE LINKING ACCOUNTS?

Don't have your login? [Visit your financial institution's site](#) to retrieve or create your username and password. This will open a new window.

[TRUSTED SECURITY](#)

Baird Online – 360 Wealth- Getting Started, *continued*

- 2) Click on **All Done** to proceed to the 360 Wealth Dashboard and click **Link Another Site** to add additional accounts.



360 Overview is a central location that lets you view a summary of your linked accounts.

Once you have linked all your accounts, you can enjoy the features and tools offered by 360 Wealth such as viewing your Net Worth, Setting up a Personal Budget, Analyzing your Income or Expenses while also reviewing your Cash Flow.

