

Client Information Instruction and Access Authorization

Each of the undersigned ("Client") authorizes and instructs Robert W. Baird & Co. Incorporated and its affiliate Baird Trust Company ("Baird") to share or grant access to certain information ("Client Information") regarding Client's account(s) held at Baird, whether now or hereafter created ("Accounts") to the person or entity listed as an authorized party below ("Authorized Party") in accordance with the terms and conditions stated herein. Client acknowledges and agrees that Client is now or may in the future (either verbally in or writing) authorize and instruct Baird to take one or more the following actions with respect to the Authorized Party:

- **Provide duplicate Account Documents to an Authorized Party.** Upon Client's request, provide to Authorized Party duplicate copies of account statements, trade confirmations, account notices and other account-related documentation ("Account Documents") with respect to Client's Accounts.
- **Provide duplicate Tax Documents to an Authorized Party.** Upon Client's request, provide to Authorized Party duplicate Forms 1099, 1042s, 5498s, and other required tax-related documents or corrections to any of the foregoing with respect to Client's Accounts.
- **Discuss Account Information with an Authorized Party.** Baird and Client's Baird Financial Advisors are authorized to discuss any aspect of Client's Accounts, including investments that Client holds in Client's Accounts or related financial matters with Authorized Party.
- **Provide Authorized Party BOL view-only access.** Upon Client's request, to issue Authorized Party a Baird Online Login (or add Client's Account to Authorized Party's existing Baird Online Login) for the purpose of viewing Account documents and other real-time Client or Client Account information Baird makes available via Baird Online from time to time.

Authorized Party *(for additional Authorized Parties attach additional pages as necessary)*

Contact Information – Authorized Party

If Authorized Party is being granted BOL view-only access, a valid email address and phone number are required.



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|-------------------------------------|-----------------------------------|-----------|
| Full Legal Name of Authorized Party | Phone Number | E-mail |
| Company/Employer | Relationship to Client/Occupation | |
| Street Address | City | State ZIP |



Client Signatures and Authorization

In consideration of Baird accepting Client's instructions indicated above, Client acknowledges and agrees as follows:

- Client is instructing Baird to send or give access to Client Information to third parties, including Account Documents and other information that is personal and confidential. Client agrees Baird cannot protect such information once in the possession of third parties.
- Client is not granting any Authorized Party the ability to effect securities transactions in an Account or to withdraw funds from an Account.
- The authorizations and instructions contained herein shall continue in full force and effect until Baird shall have received written revocation of this instruction.
- None of Baird or any of its current or former officers, directors, agents, employees or affiliates (each, a "Covered Baird Party") shall be liable to Client or any other person for any act or failure to act by a Covered Baird Party in reliance upon instructions provided herein.

Client Signatures and Dates *(Each Account owner must sign below)*

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|--|---|
| Full Legal Name of Client or Authorized Representative <i>(Print or Type)</i> | |
| Signature | Date <i>(MM-DD-YYYY)</i> |
|  |  |

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|---|---|
| Full Legal Name of Client or Authorized Representative <i>(Print or Type)</i> | |
| Signature | Date <i>(MM-DD-YYYY)</i> |
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