# **Get Started** with 360 Wealth!





Available exclusively on Baird Online, 360 Wealth enables you to securely link all your finances in one place, providing you a complete picture of your net worth. To get started, follow these easy steps:

- Have your login information ready for all your non-Baird accounts.
- Login to Baird Online and click on the 360 Wealth tab.
- Agree to the terms and conditions.
- Link your non-Baird accounts using your login information.

Log on using your personal computer, tablet or mobile phone to enjoy all of the features 360 Wealth offers.

Enroll today at www.bairdonline.com!

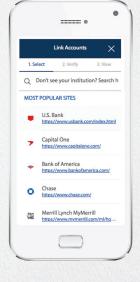
# Linking accounts



#### Select a Site

Popular banks and financial institutions are automatically populated as options. You have the option to link your home value and also have the ability to search for any site that isn't listed.





## **Enter Credentials**

Enter the login credentials for each of your outside accounts so that 360 Wealth can access each account and consolidate the information into one location. Then click **Submit**.



## **View Accounts**

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.

To learn more about 360 Wealth, contact your Financial Advisor, or Baird Online support at 888-212-8843, Monday–Friday, 7:00 a.m. – 6:00 p.m. CST.